

This is a FINAL reminder that we have not yet received your annual census and questionnaire. Please review the instructions and key deadlines outlined below to ensure timely submission.

UPCOMING DEADLINE:

Census and Questionnaire Submission Deadline: August 22nd

We must receive your census and questionnaire in good order no later than **August 22nd**. If we do not receive your data by this date, we cannot guarantee that all funding, filing, and notification deadlines are met.

Log in to the [Client Portal](#) and complete the **Year End Data Collection: January 1, 2025 – December 31, 2025** task.

Important Dates for Plan Sponsors

Milestone	Date
Census and questionnaire submission deadline	August 22
Contribution funding	September 15
AFTAP certification	September 30
PBGC filing (if applicable)	October 15
Form 5500 extended filing deadline	October 15

Resources to Support You

- Browse our [Resource Center](#), which includes important dates, how-to guides, instructional videos, step-by-step walkthroughs and a recording to our recent webinar to assist you throughout the year-end process.
- In case you missed our webinar regarding the Year-End Administration process, you can access it [here](#).

Track Your Progress: You can monitor the status of your year-end administration deliverables anytime by visiting the **Projects** section of the [Client Portal](#).

Deliverables and Timelines

Our team prioritizes work based on compliance and regulatory deadlines to ensure plans meet IRS requirements. The timelines below are our targets, but actual delivery may vary based on volume and complexity:

- **Census and Questionnaire Review:** Target completion within 5–7 business days. We will either confirm your census is in good order or request additional information.
- **Testing and Contribution Report:** If contribution calculations or ADP/ACP testing are required, target delivery is within 15 business days *after your census is deemed in good order*.
- **Annual ERISA Compliance Review:** You will receive your full compliance package—including action steps, government filings, and any plan design suggestions—with a target delivery of 60 business days after your contribution verification is received.

Expedited service may be offered (but not guaranteed) for an additional fee depending on capacity.

Important Notes on Deadlines

Census and Questionnaire Submission: Minimum required contributions for Defined Benefit or Cash Balance plans must be deposited no later than September 15th or additional excise taxes will apply. We must receive your census and questionnaire in good order no later than **August 22nd**. If we do not receive your data by this date, we cannot guarantee that all funding, filing, and notification deadlines are met.

Automated Reminders You will receive email reminders about census and Form 5500 deadlines from noreply@dwc401k.com. To ensure you don't miss these updates, please add this address to your safe sender list.

If you have questions or need clarification about any part of this communication, please contact your Retirement Plan Specialist, [RPS Name & Email].