

## Limits, Holidays, and Filing Deadlines

<b>401k Plan Limits for Plan Year</b>	<b>2019</b>	<b>2018</b>	<b>2017</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>	<b>2012</b>	<b>2011</b>	<b>2010</b>	<b>2009</b>
401k Elective Deferrals	19,000	18,500	18,000	18,000	18,000	17,500	17,500	17,000	16,500	16,500	16,500
Annual Defined Contribution Limit	56,000	55,000	54,000	53,000	53,000	52,000	51,000	50,000	49,000	49,000	49,000
Annual Compensation Limit	280,000	275,000	270,000	265,000	265,000	260,000	255,000	250,000	245,000	245,000	245,000
Catch-Up Contribution Limit	6,000	6,000	6,000	6,000	6,000	5,500	5,500	5,500	5,500	5,500	5,500
Highly Compensated Employees	125,000	120,000	120,000	120,000	120,000	115,000	115,000	115,000	110,000	110,000	110,000
Key Employee Officer Threshold	180,000	175,000	175,000	170,000	170,000	170,000	165,000	165,000	160,000	160,000	160,000
<b>NON 401K RELATED LIMITS</b>											
403(b)/457 Elective Deferrals	19,000	18,500	18,000	18,000	18,000	17,500	17,500	17,000	16,500	16,500	16,500
SIMPLE Employee Deferrals	13,000	12,500	12,500	12,500	12,500	12,000	12,000	11,500	11,500	11,500	11,500
SIMPLE Catch-Up Deferral	3,000	3,000	3,000	3,000	3,000	2,500	2,500	2,500	2,500	2,500	2,500
SEP Minimum Compensation	600	600	600	600	600	550	550	550	550	550	550
SEP Annual Compensation Limit	280,000	275,000	270,000	265,000	265,000	260,000	255,000	250,000	245,000	245,000	245,000
DB 415 Limit	225,000	220,000	215,000	210,000	210,000	210,000	205,000	200,000	195,000	195,000	195,000
IRA Contribution Limit	6,000	5,500	5,500	5,500	5,500	5,500	5,500	5,000	5,000	5,000	5,000
IRA Catchup Limit	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Social Security Wage Base	132,900	128,400	127,200	118,500	118,500	117,000	113,700	110,100	106,800	106,800	106,800

<b>Filing Deadlines</b>												
<b>Year-End</b>	<b>31-Jan</b>	<b>28-Feb</b>	<b>31-Mar</b>	<b>30-Apr</b>	<b>31-May</b>	<b>30-Jun</b>	<b>31-Jul</b>	<b>31-Aug</b>	<b>30-Sep</b>	<b>31-Oct</b>	<b>30-Nov</b>	<b>31-Dec</b>
5500 SF/EZ	31-Aug	30-Sep	31-Oct	30-Nov	31-Dec	31-Jan	28-Feb	31-Mar	30-Apr	31-May	30-Jun	31-Jul
5500 w/ Extension	15-Nov	15-Dec	15-Jan	15-Feb	15-Mar	15-Apr	15-May	15-Jun	15-Jul	15-Aug	15-Sep	15-Oct
Funding Deadline	15-Oct	15-Nov	15-Dec	15-Jan	15-Feb	15-Mar	15-Apr	15-May	15-Jun	15-Jul	15-Aug	15-Sep
<b>Form 945</b>	To IRS by Feb. 10 if payments made in full; otherwise Feb. 1											
<b>Form 1099</b>	To Participant by Jan 31; To IRS by Feb. 28											
<b>Form W-2</b>	To Employee by Jan 31											

<b>Market Holidays</b>			
<b>All Major US Stock Exchanges</b>	<b>Calendar 2020</b>	<b>Calendar 2019</b>	<b>Calendar 2018</b>
New Year's Day	01/01/2020	01/01/2019	01/01/2018
Martin Luther King, Jr. Day	01/20/2020	01/21/2019	01/15/2018
Washington's B-day (Presidents' Day)	02/17/2020	02/18/2019	02/19/2018
Good Friday	04/10/2020	04/19/2019	03/30/2018
Memorial Day	05/25/2020	05/27/2019	05/28/2018
Independence Day	07/03/2020	07/04/2019	07/04/2018
Labor Day	09/07/2020	09/02/2019	09/03/2018
Thanksgiving Day	11/26/2020	11/28/2019	11/22/2018
Christmas Day	12/25/2020	12/25/2019	12/25/2018

