

## Form 5330 Return Due Dates – Tax Year 2023

The Form 5330 has various due dates. The due date is dependent upon which Parts (IR Code Section) of the form are completed. When the due date falls on a weekend or holiday, IRS accepts returns as timely filed if received by the next business day. The table below reflects the timely filed received dates for each section of the Form 5330 return.

		<b>Timely Filed Date for:</b>	<b>Timely Filed Date for:</b>	<b>Timely Filed Date for:</b>	<b>Timely Filed Date for:</b>	<b>Timely Filed Date for:</b>	
<b>Tax Period Beginning &amp; Ending Dates</b>	<b>Tax Period</b>	<b>Section A, Section B1</b>  (due 7 month after end of tax year)	<b>Section B</b>  (due 15 <sup>th</sup> day of the 10 month after the last day of the plan year)	<b>Section C</b>  (due 15 month after the end of the plan year)	<b>Section D, Section E</b>  (due last day of the month following the month in which the reversion occurred (Section D); which the failure occurred (Section E))	<b>Section F</b>  (due 15 <sup>th</sup> day of the 5 <sup>th</sup> month following the close of the entity manager's taxable year which the plan began a party to a prohibited tax shelter transaction)	<b>Tax Year of Return</b>
01/01/23—12/31/23	202312	07/31/24	10/15/24	03/31/25	01/31/24	05/15/24	2023
02/01/23—01/31/24	202401	09/02/24	11/15/24	04/30/25	02/29/24	06/17/24	2023
03/01/23—02/29/24	202402	09/30/24	12/16/24	05/29/25	04/01/24	07/15/24	2023
04/01/23—03/31/24	202403	10/31/24	01/15/25	06/30/25	04/30/24	08/15/24	2023
05/01/23—04/30/24	202404	12/02/24	02/17/25	07/30/25	05/31/24	09/16/24	2023
06/01/23—05/31/24	202405	12/31/24	03/17/25	09/01/25	07/01/24	10/15/24	2023
07/01/23—06/30/24	202406	01/30/25	04/15/25	09/30/25	07/31/24	11/15/24	2023
08/01/23—07/31/24	202407	02/28/25	05/15/25	10/31/25	09/02/24	12/16/24	2023
09/01/23—08/31/24	202408	03/31/25	06/16/25	12/01/25	09/30/24	01/15/25	2023
10/01/23—09/30/24	202409	04/30/25	07/15/25	12/30/25	10/31/24	02/17/25	2023
11/01/23—10/31/24	202410	06/02/25	08/15/25	02/02/26	12/02/24	03/17/25	2023
12/01/23—11/30/24	202411	06/30/25	09/15/25	03/02/26	12/31/24	04/15/25	2023