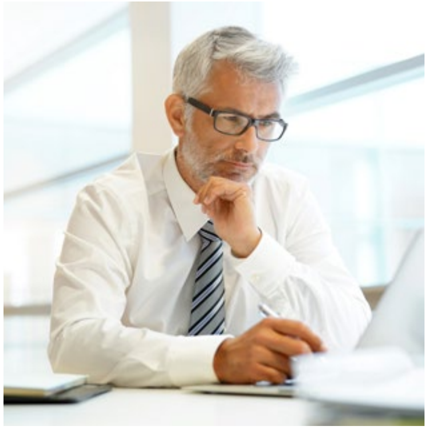
Updates and deadlines for financial advisors

SECURE Act 2.0 – what financial advisors need to know

- Up to 100% of plan startup costs for qualifying businesses – a savings of up to $16,500
- Employer contribution credit – up to additional $1,000 credit per employee for 5 years
- **Join our webinar for Financial Advisors on January 18** to learn more about how SECURE Act 2.0 can benefit your clients and their employees.



Due dates and notices are available in Paychex Flex® so you never miss a deadline. Need projections for 2023? Contact Paychex Financial Advisor Support at 877-283-9520.

Register for webinar here

Contact your regional wholesaler to learn more

Wholesale401k@paychex.com

Regional Wholesaler Map

855-588-4775

Resource Corner

Compliance Deadlines

- ***1/31/23:*** Form 1099-R due to participants who received distributions in the previous year
- ***2/28/23:*** Filing form 1099-R with IRS to report distributions made in previous year

Employee Retention Tax Credit (ERTC)

Are your clients eligible?
Find out more

State-Mandated Retirement Plans

Many states are requiring employers to offer retirement savings programs. What's happening in your clients' states? Visit our online resource for state mandated retirement.

2023 Annual Retirement Plan Limits: Download details for IRS annual contribution limits