

# Important Tax Deadlines for 2023

## *For Individuals*

### January

- 17 Estimated Tax Payment for 4th Quarter of 2022 (Form 1040-ES)

### April

- 1 First Required Minimum Distribution (RMD) by Individuals Who Turned 72 in 2022
- 18 File 2022 Tax Return (Form 1040) and Pay Tax Due
- 18 File Form 4868 to Request 6-Month Income Tax Return Filing Extension
- 18 File Schedule H (1040) and Pay Employment Taxes for Household Employees (file separately if Form 1040 is not filed)
- 18 Estimated Tax Payment for 1st Quarter of 2023 (Form 1040-ES)
- 18 Contribute to Individual Retirement Account (IRA) for 2022
- 18 Withdraw Excess IRA Contributions in 2022 if Filing of Form 1040 Was Not Extended
- 18 Contribute to Health Savings Account (HSA) for 2022
- 18 Contribute to Solo 401(k) Plan or Simplified Employee Pension (SEP) Plan for 2022
- 18 File 2019 Tax Return (Form 1040) to Request Unclaimed Tax Refund for the 2019 Tax Year
- 18 File 1041 for Estates and trusts with year end close of December 31

### June

- 15 Estimated Tax Payment for 2nd Quarter of 2023 (Form 1040-ES)
- 15 U.S. Taxpayers Living and Working Abroad File 2022 Tax Return (Form 1040) or File Form 4868 to Request 4-Month Income Tax Return Filing Extension (payment of tax not extended)
- 15 Military Personnel on Duty Outside the U.S. File 2022 Tax Return (Form 1040) or File Form 4868 to Request 4-Month Income Tax Return Filing Extension (payment of tax not extended)

### September

- 15 Estimated Tax Payment for 3rd Quarter of 2023 (Form 1040-ES)

### October

- 16 File Extended 2022 Tax Return (Form 1040) and Pay Tax Due
- 16 Withdraw Excess IRA Contributions in 2022 to Avoid Penalty if Form 1040 Was Extended
- 16 Contribute to Solo 401(k) Plan or SEP for 2022 Filing of Form 1040 Was Extended

### December

- 31 Contribution to Employer-Sponsored Retirement Plan for 2023 (401(k), 403(b), 457 or federal thrift savings plans)
- 31 Required Minimum Distribution (RMD) by Individuals who are 73 or older at the end of 2023

### January 2024

- 15 Estimated Tax Payment for 4th Quarter of 2023 (Form 1040-ES)