

KEY PLANNING & INVESTMENT DEADLINES

WINTER 2023

Susan R. Foard, CPA
President
Pugh Wealth Management, LLC

315 N. Cedar Bluff
Ste 200
Knoxville, TN 37923



FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

JANUARY

FOCUS:
2023 Key Numbers

January 1. Medicare Advantage Open Enrollment Period starts
January 1. Medicare General Enrollment Period starts
January 18. 4Q 2022 estimated taxes due

Financial Wellness Month
January 1. New Year's Day (markets closed)
January 16. MLK Day (markets closed)

Where are your
opportunities for 2023?
Let's talk...

FEBRUARY

FOCUS:
Financial Numbers

February 1. W-2's & 1099-Misc due

February 12. Super Bowl
February 14. Valentine's Day
February 20. President's Day (markets closed)

How can I serve you
better?

MARCH

FOCUS:
Tax Planning

March 15. 2022 S-Corp returns due (cal yr)
March 15. 2022 partnership returns due
March 31. Medicare Advantage Open Enrollment Period closes
March 31. Medicare General Enrollment Period closes

March 12. Daylight Savings Time begins
March 17. St. Patrick's Day
March 14. March Madness begins
March 20. First day of Spring
March 22. Ramadan begins

Let's review your
quarterly statement!

IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
865-251-0920

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Questions? Please call