

# KEY PLANNING & INVESTMENT DEADLINES

WINTER 2023

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## 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 17.** 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**  
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