

KEY PLANNING & INVESTMENT DEADLINES

WINTER 2025

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

JANUARY

FOCUS:
2025 Key Numbers

January 1. Medicare Advantage Open Enrollment Period starts

January 1. Medicare General Enrollment Period starts

January 15. 4Q 2024 estimated taxes due

Financial Wellness Month

January 1. New Year's Day
(markets closed)

January 1. Kwanzaa ends

January 20. MLK Day (markets closed)

Where are your
opportunities for 2025?
Let's talk...

FEBRUARY

FOCUS:
Financial Numbers

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

February 9. Super Bowl

February 14. Valentine's Day

February 17. President's Day (markets closed)

February 28. Ramadan begins

How can I serve you
better?

MARCH

FOCUS:
Tax Planning

March 17. 2025 S-Corp returns due (cal yr)

March 17. 2025 partnership returns due

March 31. Medicare Advantage Open Enrollment Period closes

March 31. Medicare General Enrollment Period closes

March 9. Daylight Savings Time begins

March 17. St. Patrick's Day

March 18. March Madness begins

March 20. First day of Spring

March 30. Ramadan ends

Let's review your
quarterly statement!

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