

KEY PLANNING & INVESTMENT DEADLINES

SPRING 2024

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

APRIL

FOCUS:

Social Security

April 15. 1Q 2024 estimated taxes due
April 15. File 2023 tax returns or extension
April 15. Last day to open IRA for 2023
April 15. Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2023

Financial Literacy Month

April 9. Ramadan ends
April 22-30. Passover
April 28. Take Our Kids to Work Day

**When should you apply
for Social Security?**

MAY

FOCUS:

Retirement Planning

May 15. 2023 non-profit returns due
May 27. Memorial Day (markets closed)

Military Appreciation Month

May 2-8. Teacher Appreciation Week
May 4. Kentucky Derby
May 12. Mother's Day
May 26. Indianapolis 500

**Let's review your
retirement options!**

JUNE

FOCUS:

Estate Planning

June 17. 2Q 2024 estimated taxes due
June 17. Last day for US citizens living abroad to file returns
June 30. FAFSA 2024-2025 closes

June 8. Belmont Stakes
June 13-16. U.S. Open Golf Championship
June 16. Father's Day
June 20. Summer Solstice

**Have you reviewed
your will?**

IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!

865-251-0920

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Questions? Please call