

# KEY PLANNING & INVESTMENT DEADLINES

WINTER 2024

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:  
2024 Key Numbers

**January 1.** Medicare Advantage Open Enrollment Period starts  
**January 1.** Medicare General Enrollment Period starts  
**January 16.** 4Q 2023 estimated taxes due

Financial Wellness Month  
**January 1.** New Year's Day (markets closed)  
**January 1.** Kwanza ends  
**January 15.** MLK Day (markets closed)

Where are your  
opportunities for 2024?  
Let's talk...

### FEBRUARY

FOCUS:  
Financial Numbers

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

**February 11.** Super Bowl  
**February 14.** Valentine's Day  
**February 19.** President's Day (markets closed)

How can I serve you  
better?

### MARCH

FOCUS:  
Tax Planning

**March 15.** 2024 S-Corp returns due (cal yr)  
**March 15.** 2024 partnership returns due  
**March 31.** Medicare Advantage Open Enrollment Period closes  
**March 31.** Medicare General Enrollment Period closes

**March 10.** Daylight Savings Time begins  
**March 10.** Ramadan begins  
**March 17.** St. Patrick's Day  
**March 19.** March Madness begins  
**March 19.** First day of Spring  
**March 29.** Good Friday (markets closed)  
**March 31.** Easter

Let's review your  
quarterly statement!

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

Susan R. Foard, CPA  
President  
Pugh Wealth Management, LLC  
315 N. Cedar Bluff  
Ste 200  
Knoxville, TN 37923  
865-251-0920

**Questions? Please call**