

KEY PLANNING & INVESTMENT DEADLINES

SPRING 2020

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

APRIL

FOCUS:
Social Security

April 1. Last day of grace period for first IRA required minimum distribution

April 15. File 2019 tax returns or extension

April 15. 1Q 2020 estimated taxes due

April 15. Last day to open IRA for 2019

April 15. Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2019

Financial Literacy Month

April 8. Passover begins

April 10. Good Friday (markets closed)

April 12. Easter

April 23. Ramadan begins

April 25. Take Our Kids to Work Day

When should you apply
for Social Security?

MAY

FOCUS:
Retirement Planning

May 15. 2019 non-profit returns due

May 25. Memorial Day (markets closed)

Military Appreciation Month

May 2. Kentucky Derby

May 4-8. Teacher Appreciation Week

May 10. Mother's Day

May 24. Indianapolis 500

Let's review your
retirement options!

JUNE

FOCUS:
Estate Planning

June 15. 2Q 2020 estimated taxes due

June 15. Last day for US citizens living abroad to file returns

June 30. FAFSA 2019-2020 closes

June 6. Belmont Stakes

June 18-21. U.S. Open Golf Championship

June 21. Father's Day

June 21. Summer Solstice

Have you reviewed
your will?

**IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
800-810-1736**

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