

KEY PLANNING & INVESTMENT DEADLINES

FALL 2020

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

OCTOBER

FOCUS:
Cybersecurity

October 1. Final deadline for establishing SIMPLE IRA for 2020
October 1. FAFSA 2020-2021 opens
October 15. Medicare Advantage and drug plan open enrollment begins
October 15. 2019 extended individual tax returns due

Cybersecurity Awareness Month
Long-Term Care Planning Month
October 5-9. Financial Planning Week
October 18-24. Save For Retirement Week
October 21-27. Estate Planning Week
October 31. Halloween

Are you worried
about being hacked?

NOVEMBER

FOCUS:
Year-End Planning

November 1. 2020 health insurance open enrollment starts
November 11. Veterans Day (markets open)
November 26. Thanksgiving Day (markets closed)
November 27. Markets close at 1 p.m. ET

Family Caregivers Month
November 1. Daylight Savings Time ends
November 3. Election Day
November 28. Small Business Saturday

Let's review your
potential tax bill!

DECEMBER

FOCUS:
Philanthropy

December 7. Medicare Advantage and drug plan open enrollment closes
December 25. Christmas Day (markets closed)
December 31. Last day to:
• Establish Keogh, solo 401(k)
• Make contributions to 401(k)
• Sell stock to realize gains/losses
• Take RMDs
• Pay expenses for itemized deductions
• Make tax-deductible charitable contributions
• Make annual tax-free gifts

December 3. Giving Tuesday
December 7. Pearl Harbor Day
December 10-18. Hanukkah
December 21. Winter Solstice
December 26. Kwanza begins
December 31. New Year's Eve

Happy
holidays!
Have a great
new year!

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

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