KEY PLANNING & INVESTMENT DEADLINES

SUMMER 2021

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LIFETIME PARADIGM
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	FINANCIAL DATES & DEADLINES	SPECIAL OBSERVANCES	
JULY **FOCUS:** **Caregiving**	**July 4.** Independence Day (markets closed) **July 5.** Independence Day observed (markets closed) **July 31.** Form 5500 due	Sandwich Generation Month **July 18.** National Ice Cream Day **July 30.** World Friendship Day **July 30.** Medicare's Birthday	**Caring for someone? We can help.**
AUGUST **FOCUS:** **College Planning**	**None.** Enjoy your summer!	Back to School Month American Artists Appreciation Month **August 15.** Relaxation Day **August 30.** US Open Tennis begins	**Prepared for a big tuition?**
SEPTEMBER **FOCUS:** **Health Care Planning**	**September 6.** Labor Day (markets closed) **September 15.** 3Q 2021 estimated taxes due **September 15.** 2020 extended partnership, S-corp returns due **September 30.** Last day to determine beneficiaries after an IRA owner's death	Healthy Aging Month **September 6-8.** Rosh Hashanah **September 11.** Patriot Day **September 15-16.** Yom Kippur **September 17.** Constitution/Citizenship Day (observed)	**Need help with health care?**

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

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