

KEY PLANNING & INVESTMENT DEADLINES

SUMMER 2023

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

JULY

FOCUS:
Caregiving

July 4. Independence Day (markets closed)
July 31. Form 5500 due

Sandwich Generation Month
July 17. 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 1. Relaxation Day
August 29. US Open Tennis begins

Prepared for a
big tuition?

SEPTEMBER

FOCUS:
Health Care Planning

September 4. Labor Day (markets closed)
September 15. 3Q 2023 estimated taxes due
September 15. 2022 extended partnership, S-corp returns due
September 30. Last day to determine beneficiaries after an IRA owner's death

Healthy Aging Month
September 15-17. Rosh Hashanah
September 11. Patriot Day
September 17. Constitution/Citizenship Day (observed)

Need help with
health care?

**IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
760-731-0489**

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