

KEY PLANNING & INVESTMENT DEADLINES

SPRING 2025

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

APRIL
 Focus:
 Social
 Security

April 15. 1Q 2025 estimated taxes due
 April 15. File 2024 tax returns or extension
 April 15. Last day to open IRA for 2024
 April 15. Last day to contribute to Coverdell, IRA,
 profit-sharing plans, or HSA for 2024

Financial Literacy Month
 April 12-20. Passover
 April 18. Good Friday (markets closed)
 April 20. Easter
 April 28. Take Our Kids to Work Day

**When should
 you apply
 for Social
 Security?**

MAY
 Focus:
 Retirement
 Strategies

May 15. 2024 non-profit returns due
 May 26. Memorial Day (markets closed)

Military Appreciation Month
 May 3. Kentucky Derby
 May 5-9. Teacher Appreciation Week
 May 11. Mother's Day
 May 25. Indianapolis 500

**Let's review
 your
 retirement
 options!**

JUNE
 Focus:
 Estate
 Planning

June 17. 2Q 2025 estimated taxes due
 June 17. Last day for US citizens living abroad
 to file returns
 June 30. FAFSA 2024-2025 closes

June 7. Belmont Stakes
 June 9-15. U.S. Open Golf Championship
 June 15. Father's Day
 June 20. Summer Solstice

**Have you
 reviewed
 your will?**

ANY QUESTIONS, PLEASE CALL US! 607-645-4127



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Questions? Please call

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