

# KEY PLANNING & INVESTMENT DEADLINES

## SUMMER 2025

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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 20. National Ice Cream 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 3. World Friendship Day  
 August 15. Relaxation Day  
 August 25. US Open Tennis begins

Prepared  
 for a big  
 tuition?

**SEPTEMBER**  
 Focus:  
 Health Care  
 Planning

September 1. Labor Day (markets closed)  
 September 16. 3Q 2025 estimated taxes due  
 September 16. 2024 extended partnership,  
 S-corp returns due  
 September 30. Last day to determine beneficiaries  
 after an IRA owner's death

*Healthy Aging Month*  
 September 7. US Open Tennis ends  
 September 11. Patriot Day  
 September 17. Constitution/Citizenship  
 Day (observed)

Need help  
 with health  
 care?

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



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## Questions? Please call

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