

KEY PLANNING & INVESTMENT DEADLINES

WINTER 2024

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

JANUARY

FOCUS:
2024 Key Numbers

January 1. Medicare Advantage Open Enrollment Period starts

January 1. Medicare General Enrollment Period starts

January 16. 4Q 2023 estimated taxes due

Financial Wellness Month

January 1. New Year's Day
(markets closed)

January 1. Kwanza ends

January 15. MLK Day (markets closed)

Where are your
opportunities for 2024?
Let's talk...

FEBRUARY

FOCUS:
Financial Numbers

February 1. W-2's & 1099-Misc due

February 11. Super Bowl

February 14. Valentine's Day

February 19. President's Day (markets closed)

How can I serve you
better?

MARCH

FOCUS:
Tax Planning

March 15. 2024 S-Corp returns due (cal yr)

March 15. 2024 partnership returns due

March 31. Medicare Advantage Open Enrollment Period closes

March 31. Medicare General Enrollment Period closes

March 10. Daylight Savings Time begins

March 10. Ramadan begins

March 17. St. Patrick's Day

March 19. March Madness begins

March 19. First day of Spring

March 29. Good Friday (markets closed)

March 31. Easter

Let's review your
quarterly statement!

IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
706-395-0757

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Questions? Please call

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