

# KEY PLANNING & INVESTMENT DEADLINES

WINTER 2025

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## FINANCIAL DATES & DEADLINES

## SPECIAL OBSERVANCES

### JANUARY

FOCUS:  
2025 Key Numbers

**January 1.** Medicare Advantage Open Enrollment Period starts

**January 1.** Medicare General Enrollment Period starts

**January 15.** 4Q 2024 estimated taxes due

Financial Wellness Month

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

**January 1.** Kwanzaa ends

**January 20.** MLK Day (markets closed)

Where are your  
opportunities for 2025?  
Let's talk...

### FEBRUARY

FOCUS:  
Financial Numbers

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

**February 9.** Super Bowl

**February 14.** Valentine's Day

**February 17.** President's Day (markets closed)

**February 28.** Ramadan begins

How can I serve you  
better?

### MARCH

FOCUS:  
Tax Planning

**March 17.** 2025 S-Corp returns due (cal yr)

**March 17.** 2025 partnership returns due

**March 31.** Medicare Advantage Open Enrollment Period closes

**March 31.** Medicare General Enrollment Period closes

**March 9.** Daylight Savings Time begins

**March 17.** St. Patrick's Day

**March 18.** March Madness begins

**March 20.** First day of Spring

**March 30.** Ramadan ends

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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