KEY PLANNING & INVESTMENT DEADLINES

SUMMER 2020

Debra Taylor, CPA/PFS, JD, CDFA
Wealth Manager
Taylor Financial Group, LLC

795 Franklin ave
Bldg. C, Suite 202
Franklin Lakes, NJ 07417

office@taylorfinancialgroup.com
www.taylorfinancialgroup.com

	FINANCIAL DATES & DEADLINES	SPECIAL OBSERVANCES	
JULY **FOCUS:** **Caregiving**	**July 15.** File 2019 tax returns or extension **July 15.** 1Q and 2Q 2020 estimated taxes due **July 15.** Last day to open IRA for 2019 **July 15.** Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2019 **July 31.** Form 5500 due	Sandwich Generation Month **July 1.** Medicare's Birthday **July 3.** Independence Half-Day (markets close at 1 pm) **July 4.** Independence Day (markets closed) **July 30.** World Friendship Day	**Caring for someone? We can help.**
AUGUST **FOCUS:** **College Planning**	**None.** Enjoy your summer!	Back to School Month American Artists Appreciation Month **August 15.** Relaxation Day **August 31.** US Open Tennis begins	**Prepared for a big tuition?**
SEPTEMBER **FOCUS:** **Health Care Planning**	**September 7.** Labor Day (markets closed) **September 15.** 3Q 2020 estimated taxes due **September 15.** 2019 extended partnership, S-corp returns due **September 30.** Last day to determine beneficiaries after an IRA owner's death	Healthy Aging Month **September 11.** Patriot Day **September 17.** Constitution/Citizenship Day (observed) **September 18-20.** Rosh Hashanah **September 27-28.** Yom Kippur	**Need help with health care?**

IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
(201) 891-1130

Debra Taylor, CPA/PFS, JD, CDFA
Wealth Manager
Taylor Financial Group, LLC

795 Franklin ave
Bldg. C, Suite 202
Franklin Lakes, NJ 07417

(201) 891-1130

office@taylorfinancialgroup.com
www.taylorfinancialgroup.com

Questions? Please call

(201) 891-1130