

KEY PLANNING & INVESTMENT DEADLINES

WINTER 2022

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

JANUARY

FOCUS:
2022 Key Numbers

January 1. Medicare Advantage Open Enrollment Period starts

January 1. Medicare General Enrollment Period starts

January 18. 4Q 2021 estimated taxes due

Financial Wellness Month

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

January 17. MLK Day (markets closed)

Where are your
opportunities for 2022?
Let's talk...

FEBRUARY

FOCUS:
Financial Numbers

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

February 13. Super Bowl

February 14. Valentine's Day

February 21. President's Day (markets closed)

How can I serve you
better?

MARCH

FOCUS:
Tax Planning

March 15. 2021 S-Corp returns due (cal yr)

March 15. 2021 partnership returns due

March 31. Medicare Advantage Open Enrollment Period closes

March 31. Medicare General Enrollment Period closes

March 13. Daylight Savings Time begins

March 17. St. Patrick's Day

March 13. March Madness begins

March 20. First day of Spring

Let's review your
quarterly statement!

IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
732-800-2375

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