

# KEY PLANNING & INVESTMENT DEADLINES

## WINTER 2022

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Value  
Aligned  
PARTNERS

### 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

### SPECIAL OBSERVANCES

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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**Questions? Please call  
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