

# KEY PLANNING & INVESTMENT DEADLINES

SUMMER 2024

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## FINANCIAL DATES & DEADLINES

## SPECIAL OBSERVANCES

**JULY**

FOCUS:  
Caregiving

**July 4.** Independence Day (markets closed)  
**July 31.** Form 5500 due

Sandwich Generation Month  
**July 21.** National Ice Cream Day  
**July 30.** World Friendship Day  
**July 30.** Medicare's Birthday

Caring for someone?  
We can help

**AUGUST**

FOCUS:  
College Planning

**None.** Enjoy your summer!

Back to School Month  
American Artists Appreciation Month  
**August 1.** Relaxation Day  
**August 26.** US Open Tennis begins

Prepared for a  
big tuition?

**SEPTEMBER**

FOCUS:  
Health Care Planning

**September 2.** Labor Day (markets closed)  
**September 16.** 3Q 2024 estimated taxes due  
**September 16.** 2023 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)

Need help with  
health care?

**IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!**  
**910.663.4293**

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## Questions? Please call

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