

KEY PLANNING & INVESTMENT DEADLINES

WINTER 2026

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

JANUARY

FOCUS:
2026 Key Numbers

January 1. Medicare Advantage Open Enrollment Period starts
January 1. Medicare General Enrollment Period starts
January 16. 4Q 2025 estimated taxes due

Financial Wellness Month
January 1. New Year's Day (markets closed)
January 1. Kwanza ends
January 15. MLK Day (markets closed)

Where are your opportunities for 2026?
Let's talk...

FEBRUARY

FOCUS:
Financial Numbers

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

February 8. Super Bowl
February 14. Valentine's Day
February 16. President's Day (markets closed)
February 17. Ramadan begins

How can I serve you better?

MARCH

FOCUS:
Tax Planning

March 16. 2026 S-Corp returns due (cal yr)
March 16. 2026 partnership returns due
March 31. Medicare Advantage Open Enrollment Period closes
March 31. Medicare General Enrollment Period closes

March 8. Daylight Savings Time begins
March 17. St. Patrick's Day
March 18. March Madness begins
March 20. First day of Spring
March 19. Ramadan ends

Let's review your quarterly statement!

IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
724-942-2639

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Questions? Please call