

KEY PLANNING & INVESTMENT DEADLINES

FALL 2025

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

OCTOBER

FOCUS:
Cybersecurity

October 1. Final deadline for establishing SIMPLE IRA for 2025
October 1. FAFSA 2026-2027 opens
October 15. Medicare Advantage and drug plan open enrollment begins
October 15. 2024 extended individual tax returns due

Cybersecurity Awareness Month
October 15-21. Retirement Security Week
October 31. Halloween

Are you scared of
being?

NOVEMBER

FOCUS:
Long-Term Care

November 1. 2025 Health insurance open enrollment starts
November 11. Veterans Day
November 27. Thanksgiving Day (markets closed)
November 28. Markets close at 1 p.m. ET

Long-Term Care Planning Month
November 2. Daylight Savings Time ends
November 4. Election Day
November 29. Small Business Saturday

Do you have a long-
term care plan?

DECEMBER

FOCUS:
Year-End Planning

December 7. Medicare Advantage and drug plan open enrollment closes
December 25. Christmas Day (markets closed)
December 31. Last day to:

- Establish Keogh, solo 401(k)
- Make contributions to 401(k)
- Sell stock to realize gains/losses
- Take RMDs
- Pay expenses for itemized deductions
- Make tax-deductible charitable contributions
- Make annual tax-free gifts

December 2. Giving Tuesday
December 7. Pearl Harbor Day
December 14. Hanukkah starts
December 21. Winter Solstice
December 26. Kwanzaa begins
December 31. New Year's Eve

Do you have your
documents in order for
year-end planning?

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

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Questions? Please call