

# KEY PLANNING & INVESTMENT DEADLINES

SUMMER 2025

**Braun-Bostich & Associates**  
Wealth Transformed

1600 Ashwood Dr  
Suite 1601  
Canonsburg, PA 15317



## FINANCIAL DATES & DEADLINES

## SPECIAL OBSERVANCES

### JULY

**FOCUS:**  
Caregiving

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

Sandwich Generation Month  
**July 20.** National Ice Cream 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 3.** World Friendship Day  
**August 15.** Relaxation Day  
**August 25.** US Open Tennis begins

**Prepared for a  
big tuition?**

### SEPTEMBER

**FOCUS:**  
Health Care Planning

**September 1.** Labor Day (markets closed)  
**September 16.** 3Q 2025 estimated taxes due  
**September 16.** 2024 extended partnership, S-corp returns due  
**September 30.** Last day to determine beneficiaries after an IRA owner's death

Healthy Aging Month  
**September 7.** US Open Tennis ends  
**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!**  
**724-942-2639**

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**Questions? Please call**