

KEY PLANNING & INVESTMENT DEADLINES

SPRING 2025

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

APRIL

FOCUS:
Social Security

April 15. 1Q 2025 estimated taxes due
April 15. File 2024 tax returns or extension
April 15. Last day to open IRA for 2024
April 15. Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2024

Financial Literacy Month
April 12-20. Passover
April 18. Good Friday (markets closed)
April 20. Easter
April 28. Take Our Kids to Work Day

**When should you apply
for Social Security?**

MAY

FOCUS:
Retirement Planning

May 15. 2024 non-profit returns due
May 26. Memorial Day (markets closed)

Military Appreciation Month
May 3. Kentucky Derby
May 9-9. Teacher Appreciation Week
May 11. Mother's Day
May 25. Indianapolis 500

**Let's review your
retirement options!**

JUNE

FOCUS:
Estate Planning

June 17. 2Q 2025 estimated taxes due
June 17. Last day for US citizens living abroad to file returns
June 30. FAFSA 2024-2025 closes

June 7. Belmont Stakes
June 9-15. U.S. Open Golf Championship
June 15. Father's Day
June 20. Summer Solstice

**Have you reviewed
your will?**

**IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
(802) 227-2279**

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Questions? Please call