

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!
(802) 227-2279

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Questions? Please call