

KEY PLANNING & INVESTMENT DEADLINES

SPRING 2026

Kevin Theissen
Financial Advisor
HWC Financial
4532 Main Street
Manchester Center, VT 05255



FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

APRIL
FOCUS:
Social Security

April 15. 1Q 2026 estimated taxes due
April 15. File 2025 tax returns or extension
April 15. Last day to open IRA for 2025
April 15. Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2025

Financial Literacy Month
April 1-9. Passover
April 3. Good Friday (markets closed)
April 5. Easter
April 28. Take Our Kids to Work Day

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

MAY
FOCUS:
Retirement Planning

May 15. 2025 non-profit returns due
May 25. Memorial Day (markets closed)

Military Appreciation Month
May 2. Kentucky Derby
May 4-8. Teacher Appreciation Week
May 10. Mother's Day
May 24. Indianapolis 500

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

JUNE
FOCUS:
Estate Planning

June 15. 2Q 2026 estimated taxes due
June 15. Last day for US citizens living abroad to file returns
June 30. FAFSA 2026-2027 closes

June 6. Belmont Stakes
June 18-21. U.S. Open Golf Championship
June 21. Father's Day
June 21. 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