

KEY PLANNING & INVESTMENT DEADLINES

SUMMER 2026

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FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

JULY
FOCUS:
Caregiving

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

Sandwich Generation Month
July 19. 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 2. World Friendship Day
August 15. Relaxation Day
August 30. US Open Tennis begins

**Prepared for a
big tuition?**

SEPTEMBER
FOCUS:
Health Care Planning

September 7. Labor Day (markets closed)
September 15. 3Q 2026 estimated taxes due
September 15. 2025 extended partnership, S-corp returns due
September 30. Last day to determine beneficiaries after an IRA owner's death

Healthy Aging Month
September 11. Patriot Day
September 13. US Open Tennis ends
September 17. Constitution/Citizenship Day (observed)
September 22. Fall Equinox

**Need help with
health care?**

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

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Questions? Please call