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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