

KEY PLANNING & INVESTMENT DEADLINES

SPRING
2019

Foresters
Financial

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Financial Dates & Deadlines

Special Observances

April
Focus:
Social
Security

April 1. Last day of grace period for first IRA required minimum distribution
April 15. File 2018 tax returns or extension
April 15. 1Q 2019 estimated taxes due
April 15. Last day to open IRA for 2018
April 15. Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2018

Financial Literacy Month
April 19. Good Friday (markets closed)
April 19. Passover
April 21 Easter
April 24. Administrative Professionals Day
April 25. Take Our Kids to Work Day

When Should
You Apply for
Social
Security?

May
Focus:
Retirement
Planning

May 15. 2018 non-profit returns due
May 27. Memorial Day (markets closed)

Military Appreciation Month
May 6-10. Teacher Appreciation Week
May 3-4. Kentucky Derby
May 12. Mother's Day
May 26. Indianapolis 500

Let's Review
Your
Retirement
Options!

June
Focus:
Generational
Planning

June 17. 2Q 2019 estimated taxes due
June 17. Last day for US citizens living abroad to file returns
June 30. FAFSA 2018-2019 closes

June 8. Belmont Stakes
June 13-16. U.S. Open Golf Championship
June 16. Father's Day
June 21. Summer Solstice

Have You
Thought
About Your
Legacy?

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IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US! (800) 342-4015

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