

# KEY PLANNING & INVESTMENT DEADLINES

SPRING 2018

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WEALTH MANAGEMENT

	FINANCIAL DATES & DEADLINES	SPECIAL OBSERVANCES	
<p><b>APRIL</b></p> <p>FOCUS: Social Security</p>	<p><b>April 1.</b> Last day of grace period for first IRA required minimum distribution  <b>April 17.</b> File 2017 tax returns or extension  <b>April 17.</b> 1Q 2018 estimated taxes due  <b>April 17.</b> Last day to open IRA for 2017  <b>April 17.</b> Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2017</p>	<p>Financial Literacy Month  <b>April 1.</b> Easter  <b>April 5-8.</b> The Masters Tournament  <b>April 7.</b> Last day of Passover  <b>April 8.</b> Orthodox Easter  <b>April 25.</b> Administrative Professionals Day  <b>April 26.</b> Take Our Kids to Work Day</p>	<p><b>When should you apply for Social Security?</b></p>
<p><b>MAY</b></p> <p>FOCUS: Retirement Planning</p>	<p><b>May 15.</b> 2017 non-profit returns due  <b>May 28.</b> Memorial Day (markets closed)</p>	<p>Military Appreciation Month  <b>May 4-5.</b> Kentucky Derby  <b>May 7-11.</b> Teacher Appreciation Week  <b>May 13.</b> Mother's Day  <b>May 27.</b> Indianapolis 500</p>	<p><b>Let's review your retirement options!</b></p>
<p><b>JUNE</b></p> <p>FOCUS: Generational Planning</p>	<p><b>June 15.</b> 2Q 2018 estimated taxes due  <b>June 15.</b> Last day for US citizens living abroad to file returns  <b>June 30.</b> FAFSA 2017-2018 closes</p>	<p><b>June 9.</b> Belmont Stakes  <b>June 11-17.</b> U.S. Open Golf Championship  <b>June 17.</b> Father's Day  <b>June 21.</b> Summer Solstice</p>	<p><b>Have you thought about your legacy?</b></p>

**IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US! 847-256-7495**

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