

KEY PLANNING & INVESTMENT DEADLINES

SUMMER 2018

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WEALTH MANAGEMENT

	FINANCIAL DATES & DEADLINES	SPECIAL OBSERVANCES	
<p>JULY FOCUS: Caregiving</p>	<p>July 3. Independence Half-Day (markets close at 1 p.m.) July 4. Independence Day (markets closed) July 31. Form 5500 due</p>	<p>Sandwich Generation Month July 2 - 15. Wimbledon July 7 - 29. Tour de France July 15. National Ice Cream Day</p>	<p>Caring for someone? We can help.</p>
<p>AUGUST FOCUS: College Planning</p>	<p>None. Enjoy your summer!</p>	<p>Back to School Month American Artists Appreciation Month August 6 - 12. PGA Championship August 15. Relaxation Day</p>	<p>Prepared for a big tuition?</p>
<p>SEPTEMBER FOCUS: Health Care Planning</p>	<p>September 3. Labor Day (markets closed) September 17. 3Q 2018 estimated taxes due September 17. 2017 extended partnership, S-Corp returns due September 30. Last day to determine beneficiaries after an IRA owner's death.</p>	<p>Healthy Aging Month September 9. Grandparent's Day September 9 - 11. Rosh Hashanah September 11. Patriot Day September 17. Constitution/Citizenship Day (observed) September 18 -19. Yom Kippur</p>	<p>Need help with health care?</p>

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

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