

# KEY PLANNING & INVESTMENT DEADLINES

WINTER 2018

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WEALTH MANAGEMENT

	FINANCIAL DATES & DEADLINES	SPECIAL OBSERVANCES	
<p><b>JANUARY</b></p> <p>FOCUS: 2018 Key Numbers</p>	<p><b>January 1.</b> Medicare Advantage Disenrollment Period opens  <b>January 1.</b> Medicare General Enrollment opens  <b>January 16.</b> 4Q 2017 estimated taxes due</p>	<p>Financial Wellness Month  <b>January 1.</b> New Years Day (markets closed)  <b>January 8.</b> College Football Championship  <b>January 15.</b> MLK Day (markets closed)</p>	<p><b>Where are your opportunities in 2018? Let's talk...</b></p>
<p><b>FEBRUARY</b></p> <p>FOCUS: Financial Numbers</p>	<p><b>February 14.</b> Medicare Advantage Disenrollment Period closes</p>	<p><b>February 4.</b> Superbowl  <b>February 13.</b> Mardi Gras  <b>February 14.</b> Valentine's Day  <b>February 19.</b> President's Day (markets closed)</p>	<p><b>How can I serve you better?</b></p>
<p><b>MARCH</b></p> <p>FOCUS: Tax Planning</p>	<p><b>March 15.</b> 2017 S-Corp returns due (cal yr)  <b>March 15.</b> 2017 Partnership returns due  <b>March 31.</b> Medicare General Enrollment closes</p>	<p><b>March 11.</b> Daylight Savings Time begins  <b>March 13.</b> March Madness begins  <b>March 17.</b> St. Patrick's Day  <b>March 20.</b> First day of Spring  <b>March 30.</b> Good Friday (markets closed)  <b>March 30.</b> Passover begins</p>	<p><b>Let's review your quarterly statement!</b></p>

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

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