

# KEY PLANNING & INVESTMENT DEADLINES

SPRING 2025

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## FINANCIAL DATES & DEADLINES

## SPECIAL OBSERVANCES

**APRIL**  
FOCUS:  
Social Security

**April 15.** 1Q 2025 estimated taxes due  
**April 15.** File 2024 tax returns or extension  
**April 15.** Last day to open IRA for 2024  
**April 15.** Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2024

Financial Literacy Month  
**April 12-20.** Passover  
**April 18.** Good Friday (markets closed)  
**April 20.** Easter  
**April 28.** Take Our Kids to Work Day

**When should you apply  
for Social Security?**

**MAY**  
FOCUS:  
Retirement Planning

**May 15.** 2024 non-profit returns due  
**May 26.** Memorial Day (markets closed)

Military Appreciation Month  
**May 3.** Kentucky Derby  
**May 5-9.** Teacher Appreciation Week  
**May 11.** Mother's Day  
**May 25.** Indianapolis 500

**Let's review your  
retirement options!**

**JUNE**  
FOCUS:  
Estate Planning

**June 17.** 2Q 2025 estimated taxes due  
**June 17.** Last day for US citizens living abroad to file returns  
**June 30.** FAFSA 2024-2025 closes

**June 7.** Belmont Stakes  
**June 9-15.** U.S. Open Golf Championship  
**June 15.** Father's Day  
**June 20.** Summer Solstice

**Have you reviewed  
your will?**

**IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!  
910.663.4293**

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## Questions? Please call

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