

# KEY PLANNING & INVESTMENT DEADLINES

SPRING 2024

Centerline Wealth Advisors

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## FINANCIAL DATES & DEADLINES

## SPECIAL OBSERVANCES

**APRIL**

**FOCUS:**

**Social Security**

**April 15.** 1Q 2024 estimated taxes due  
**April 15.** File 2023 tax returns or extension  
**April 15.** Last day to open IRA for 2023  
**April 15.** Last day to contribute to Coverdell, IRA, profit-sharing plans, or HSA for 2023

Financial Literacy Month

**April 9.** Ramadan ends  
**April 22-30.** Passover  
**April 28.** Take Our Kids to Work Day

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

**MAY**

**FOCUS:**

**Retirement Planning**

**May 15.** 2023 non-profit returns due  
**May 27.** Memorial Day (markets closed)

Military Appreciation Month

**May 2-8.** Teacher Appreciation Week  
**May 4.** Kentucky Derby  
**May 12.** Mother's Day  
**May 26.** Indianapolis 500

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

**JUNE**

**FOCUS:**

**Estate Planning**

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

**June 8.** Belmont Stakes  
**June 13-16.** U.S. Open Golf Championship  
**June 16.** 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!**

**502-242-1561**

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**Questions? Please call**