

IMPORTANT DATES FOR INDIVIDUALS	
January 1	<ul style="list-style-type: none"> • Start of the tax year (calendar) and Q1 • Start of General Enrollment Period for Medicare Part A and Part B • Start of Open Enrollment Period for Medicare Advantage
January 15	<ul style="list-style-type: none"> • Q4 estimated payment deadline for prior year
January 31	<ul style="list-style-type: none"> • Income tax return (Form 1040) filing and payment deadline to avoid late penalty for Q4 estimate, if it was not timely paid
February 15	<ul style="list-style-type: none"> • Form W-4 filing deadline for taxpayers who claimed an exemption from income tax withholding for the prior year to continue their exemption in the current year
March 31	<ul style="list-style-type: none"> • End of Medicare General Enrollment Period
April 1	<ul style="list-style-type: none"> • Required Beginning Date for RMDs • Start of Q2
April 15	<ul style="list-style-type: none"> • Income tax return (Form 1040) filing and payment deadline • Gift tax return (Form 709) filing and payment deadline • Request for automatic six-month extension (Form 4868) filing deadline to extend filing Form 1040 and 709 • Q1 estimated payment deadline • Deadline to contribute to an IRA or HSA for prior tax year
June 15	<ul style="list-style-type: none"> • Q2 estimated payment deadline
June 30	<ul style="list-style-type: none"> • Deadline to file FAFSA for prior academic year
July 1	<ul style="list-style-type: none"> • Start of Q3
September 15	<ul style="list-style-type: none"> • Q3 estimated payment deadline
September 30	<ul style="list-style-type: none"> • Determination date for identifying designated beneficiaries of retirement accounts (continue on next column)

IMPORTANT DATES FOR INDIVIDUALS (CONTINUED)	
October 1	<ul style="list-style-type: none"> • Start of Q4
October 15	<ul style="list-style-type: none"> • Extended income tax return (Form 1040) and gift tax return (Form 709) filing deadline • Start of Open Enrollment Period for existing Medicare enrollees
November 1	<ul style="list-style-type: none"> • Start of Open Enrollment Period for Health Insurance Marketplace
December 1	<ul style="list-style-type: none"> • Expected first day to file FAFSA for upcoming academic year
December 7	<ul style="list-style-type: none"> • End of Open Enrollment Period for existing Medicare enrollees
December 15	<ul style="list-style-type: none"> • Health insurance marketplace deadline in order for coverage to begin on January 1st of the following year
December 31	<ul style="list-style-type: none"> • Deadline for satisfying RMDs for current year • Deadline for dividing retirement accounts with multiple beneficiaries in order to use separate accounting • Deadline for completing gifts for tax year • End of tax year (calendar)

IMPORTANT DATES FOR BUSINESS TAXPAYERS	
January 1	<ul style="list-style-type: none"> • Start of the tax year (calendar) and Q1
January 15	<ul style="list-style-type: none"> • Q4 estimated payment deadline for prior year for sole proprietorships and single-member LLCs
January 31	<ul style="list-style-type: none"> • Various Forms 1099 and 1098 issuance deadline • Form W-2 issuance deadline
February 28	<ul style="list-style-type: none"> • Various Forms 1099 and other information returns paper filing deadline (continue on next page)

IMPORTANT DATES FOR BUSINESS TAXPAYERS (CONTINUED)	
March 15	<ul style="list-style-type: none"> Income tax return (Form 1120S) filing and payment deadline for calendar year S-corporations Income tax return (Form 1065 or 1065-B) filing and payment deadline for calendar year multi-member partnerships and multi-member LLCs (default) K-1 issuance deadline Request for automatic six-month extension (Form 7004) filing deadline to extend filing Form 1120S, 1065, and 1065-B S-corporation election (Form 2553) filing deadline to be treated as an S-corporation in the current year
March 31	<ul style="list-style-type: none"> Various Forms 1099 and other information returns e-file deadline
April 1	<ul style="list-style-type: none"> Start of Q2
April 15	<ul style="list-style-type: none"> Income tax return (Form 1040) filing and payment deadline for sole proprietorships and single-member LLCs Request for automatic six-month extension (Form 4868) filing deadline to extend filing Form 1040 Income tax return (Form 1120) filing and payment deadline for calendar year C-Corporations and multi-member LLCs that elect to be classified as a corporation Request for automatic six-month extension (Form 7004) filing deadline to extend filing Form 1120 Q1 estimated payment deadline for sole proprietorships, single-member LLCs, C-corporations, and multi-member LLCs that elect to be treated as a corporation
June 15	<ul style="list-style-type: none"> Q2 estimated payment deadline for sole proprietorships, single-member LLCs, C-corporations, and multi-member LLCs that elect to be treated as a corporation
July 1	<ul style="list-style-type: none"> Start of Q3 (continue on next column)

IMPORTANT DATES FOR BUSINESS TAXPAYERS (CONTINUED)	
September 15	<ul style="list-style-type: none"> Q3 estimated payment deadline for sole proprietorships, single-member LLCs, C-corporations, and multi-member LLCs that elect to be treated as a corporation Extended income tax return (Form 1120S) filing deadline for calendar year S-corporations Extended income tax return (Form 1065 or 1065-B) filing deadline for calendar year multi-member partnerships and multi-member LLCs (default)
October 1	<ul style="list-style-type: none"> Start of Q4
October 15	<ul style="list-style-type: none"> Extended income tax return (Form 1040) filing deadline for sole proprietorships and single-member LLCs Extended income tax return (Form 1120) filing deadline for calendar year C-Corporations and multi-member LLCs that elect to be classified as a corporation
December 15	<ul style="list-style-type: none"> Q4 estimated payment deadline for C-corporations and multi-member LLCs that elect to be treated as a corporation
December 31	<ul style="list-style-type: none"> End of tax year (calendar)
<p>Subject to exceptions due to individual circumstances, entity elections, and delays when deadlines fall on weekends or legal holidays.</p>	

The information provided herein was obtained from sources believed to be reliable and is believed to be accurate as of the time presented, but is without any express or implied warranties of any kind. Neither Swad Wealth Management, LLC nor Zack Swad warrant that the information is free from error.

The information provided herein is not advice specific to you or your circumstances but is instead general tips and education. None of the information provided herein is intended as investment, tax or legal advice. Your use of the information is at your sole risk. Before considering acting on any information provided herein, you should consult with your investment, tax or legal advisor.

Under no circumstances shall Swad Wealth Management, LLC or Zack Swad be liable for any direct, indirect, special or consequential damages that result from your use of, or your inability to use, the information provided herein.

This information is not intended as a recommendation, offer or solicitation to buy, hold or sell any financial instrument or investment advisory services.

Zack Swad, CFP®, CWS®, BFA™, AWMA®, AAMS®

100 Stony Point Rd, Suite 244, Santa Rosa, CA 95401

zack@swadwealth.com | 707-899-1010 | www.swadwealth.com