

TAX PLANNING CALENDAR

This calendar provides an example on **key tax deadlines** and **tax planning activities** throughout the year.

Month	Action Items	Review Items
January	<ul style="list-style-type: none"> • Begin to compile information for tax reports • Confirm estimated tax payments 	<ul style="list-style-type: none"> • Preliminary current year tax plan review • RMD review • Planning for upcoming cash flow needs • Estimates vs withholding review • Deductibility of fees review
February	<ul style="list-style-type: none"> • Prepare tax reports • Begin collecting tax returns 	<ul style="list-style-type: none"> • Preliminary current year tax plan review continued
March	<ul style="list-style-type: none"> • Prepare tax reports continued 	<ul style="list-style-type: none"> • Tax return review • Contributions to qualified plans
April	<ul style="list-style-type: none"> • Confirm estimated tax payments 	<ul style="list-style-type: none"> • Tax return review continued • Tax extension review • Contributions to qualified plans continued
May	<ul style="list-style-type: none"> • Collect remaining tax returns • Prepare tax notes 	<ul style="list-style-type: none"> • Current year tax plan review • Tax projections
June	<ul style="list-style-type: none"> • Confirm estimated tax payments 	<ul style="list-style-type: none"> • Current year tax plan review continued
July		<ul style="list-style-type: none"> • Review YTD contributions to contributory plans
August		<ul style="list-style-type: none"> • Mid-Year Review (including distributions, contributions and realized gains/losses)
September	<ul style="list-style-type: none"> • Confirm estimated tax payments 	
October	<ul style="list-style-type: none"> • Final collection of tax returns 	<ul style="list-style-type: none"> • Tax return review continued • Final contribution planning – business retirement plans
November		<ul style="list-style-type: none"> • Final current year tax plan review • Distribution planning • Contribution planning – qualified plans
December	<ul style="list-style-type: none"> • Confirm State estimated tax payments 	<ul style="list-style-type: none"> • Final current year tax plan review continued • Realized gain (loss) review • ROTH conversions

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