

TAX PLANNING CALENDAR

This calendar provides an example of **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"> • Continue preliminary current year tax plan review |
| March | <ul style="list-style-type: none"> • Continue preparing tax reports | <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"> • Continue tax return review • Review tax extension • Continue contributions to qualified plans |
| 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"> • Continue current year tax plan review |
| 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"> • Continue tax return review • 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"> • Continue final current year tax plan review • Realized gain (loss) review • ROTH conversions |

Symmetry Partners, LLC is an investment advisory firm registered with the Securities and Exchange Commission. The firm only transacts business in states where it is properly registered or excluded or exempted from registration requirements. This material is a general communication being provided for informational purposes only. It is educational in nature and not designed to be a recommendation for any specific investment strategy. Prior to making any investment or financial decisions, any investor should seek individualized advice from a personal financial, legal, tax and other professional advisors that take into account all of the particular facts and circumstances of an investor's own situation. Symmetry Partners, LLC does not provide tax or legal advice. Please note that (i) any discussion of U.S. tax matters contained in this material cannot be used by you for the purpose of avoiding tax penalties; (ii) this material was provided to support the promotion or marketing of the matters addressed herein; and (iii) you should seek advice based on your particular circumstances from an independent tax advisor.