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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	• Begin to compile information for tax reports • Confirm estimated tax payments	• Preliminary current year tax plan review • RMD review • Planning for upcoming cash flow needs • Estimates vs withholding review • Deductibility of fees review
February	• Prepare tax reports • Begin collecting tax returns	• Continue preliminary current year tax plan review
March	• Continue preparing tax reports	• Tax return review • Contributions to qualified plans
April	• Confirm estimated tax payments	• Continue tax return review • Review tax extension • Continue contributions to qualified plans
May	• Collect remaining tax returns • Prepare tax notes	• Current year tax plan review • Tax projections
June	• Confirm estimated tax payments	• Continue current year tax plan review
July		• Review YTD contributions to contributory plans
August		• Mid-Year Review (including distributions, contributions, and realized gains/losses)
September	• Confirm estimated tax payments	
October	• Final collection of tax returns	• Continue tax return review • Final contribution planning – business retirement plans
November		• Final current year tax plan review • Distribution planning • Contribution planning – qualified plans
December	• Confirm state estimated tax payments	• Continue final current year tax plan review • Realized gain (loss) review • ROTH conversions