

A quick guide
to help you
stay on track



2018 Retirement Calendar Checklist



<p style="text-align: center;">JANUARY</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st Medicare Advantage disenrollment period starts (ends Feb. 14)* <input type="checkbox"/> 1st Medicare general enrollment period starts (ends Mar. 31)** <input type="checkbox"/> 17th Pay your estimated taxes for Q4 of 2017 by this date 	<p style="text-align: center;">FEBRUARY</p> <ul style="list-style-type: none"> <input type="checkbox"/> 14th Medicare Advantage disenrollment period deadline* <input type="checkbox"/> This Month Medicare general enrollment period continues ** <input type="checkbox"/> This Month Begin organizing your 2017 taxes 	<p style="text-align: center;">MARCH</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st Medicare general enrollment period deadline** <input type="checkbox"/> 12th Turn your clocks ahead!
<p style="text-align: center;">APRIL</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st Last day to take your first IRA required minimum distribution without penalty <input type="checkbox"/> 17th Deadline to file your taxes or apply for an extension <input type="checkbox"/> 17th Pay your Q1 estimated taxes 	<p style="text-align: center;">JUNE</p> <ul style="list-style-type: none"> <input type="checkbox"/> 15th Pay your Q2 estimated taxes <input type="checkbox"/> 21st Longest day of the year. Enjoy summer! 	<p style="text-align: center;">SEPTEMBER</p> <ul style="list-style-type: none"> <input type="checkbox"/> 15th Pay your Q3 estimated taxes <input type="checkbox"/> 30th Last day to determine beneficiaries after an IRA owner's death <input type="checkbox"/> This Month Begin final quarter tasks
<p style="text-align: center;">OCTOBER</p> <ul style="list-style-type: none"> <input type="checkbox"/> 2nd Extended trust and estate tax returns due <input type="checkbox"/> 15th Medicare Advantage and drug plan open enrollment starts (ends Dec. 7) <input type="checkbox"/> 15th Extended individual tax returns due <input type="checkbox"/> 15th Last day to undo a Roth IRA conversion 	<p style="text-align: center;">NOVEMBER</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st ACA open enrollment starts (ends Dec. 15th) <input type="checkbox"/> 5th Turn your clocks back! <input type="checkbox"/> This Month Medicare Advantage and drug plan open enrollment continues 	<p style="text-align: center;">DECEMBER</p> <ul style="list-style-type: none"> <input type="checkbox"/> 7th Deadline for Medicare Advantage and drug plan open enrollment <input type="checkbox"/> 15th ACA open enrollment closes <input type="checkbox"/> 31st Last day for stocks, RMDs, itemized deductions, gifts to count for 2018 taxes

*Note: If you're in your first year of Medicare and took a Medicare Advantage plan, or you switched from a Medigap plan to try Medicare Advantage, you can leave your Medicare Advantage plan now through the February 14th and switch to Original Medicare. Start evaluating your needs. **Note: If you missed your Initial Enrollment Period or Special Enrollment Period, use this chance to sign up for Medicare Parts A & B. Coverage will start July 1st.

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