

A quick guide
to help you
stay on track



2019 Retirement Calendar and Checklist



<p>JANUARY</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st Medicare Advantage open enrollment period begins * <input type="checkbox"/> 1st Medicare general enrollment period begins ** <input type="checkbox"/> 15th Pay your estimated taxes for Q4 of 2018 by this date 	<p>FEBRUARY</p> <ul style="list-style-type: none"> <input type="checkbox"/> This Month Medicare Advantage open enrollment period continues * <input type="checkbox"/> This Month Medicare general enrollment period continues ** <input type="checkbox"/> This Month Begin organizing your 2017 taxes 	<p>MARCH</p> <ul style="list-style-type: none"> <input type="checkbox"/> 31st Deadline Medicare Advantage open enrollment period* <input type="checkbox"/> 31st Deadline Medicare general enrollment period** <input type="checkbox"/> 10th Turn your clocks ahead!
<p>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"/> 15th Deadline to file your taxes or apply for an extension <input type="checkbox"/> 15th Pay your Q1 estimated taxes 	<p>JUNE</p> <ul style="list-style-type: none"> <input type="checkbox"/> 17th Pay your Q2 estimated taxes 21st First day of summer! 	<p>SEPTEMBER</p> <ul style="list-style-type: none"> <input type="checkbox"/> 16th 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>OCTOBER</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st Extended trust and estate tax returns due <input type="checkbox"/> 15th Medicare Advantage and drug plan open enrollment begins (ends Dec. 7) <input type="checkbox"/> 15th Extended individual tax returns due 	<p>NOVEMBER</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st ACA open enrollment starts (ends Dec. 15th) <input type="checkbox"/> 3rd Turn your clocks back! <input type="checkbox"/> This Month Medicare Advantage and drug plan open enrollment continues 	<p>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 Deadline for ACA open enrollment <input type="checkbox"/> 31st Last day for stocks, RMDs, itemized deductions, gifts to count for 2019 taxes

*New in 2019, this enrollment period allows you to "test drive" your plan before deciding to keep it, switch plans or select the Original Medicare (some restrictions may apply so consult a specialist.)

**Note: If you missed your initial enrollment period or special enrollment period, use this opportunity to sign up for Medicare Parts A & B. Coverage for these begin July 1st.

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