

A quick guide  
to help you  
stay on track



# 2020 Retirement Calendar and Checklist



<p><b>JANUARY</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>1<sup>st</sup></b> Medicare Advantage open enrollment period begins *</li> <li><input type="checkbox"/> <b>1<sup>st</sup></b> Medicare general enrollment period begins **</li> <li><input type="checkbox"/> <b>15<sup>th</sup></b> Pay your estimated taxes for Q4 of 2019 by this date</li> </ul>	<p><b>FEBRUARY</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>This Month</b> Medicare Advantage open enrollment period continues *</li> <li><input type="checkbox"/> <b>This Month</b> Medicare general enrollment period continues **</li> <li><input type="checkbox"/> <b>This Month</b> Begin organizing your 2019 taxes</li> </ul>	<p><b>MARCH</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>31<sup>st</sup></b> Deadline Medicare Advantage open enrollment period*</li> <li><input type="checkbox"/> <b>31<sup>st</sup></b> Deadline Medicare general enrollment period**</li> <li><input type="checkbox"/> <b>8<sup>th</sup></b> Turn your clocks ahead!</li> </ul>
<p><b>APRIL</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>1<sup>st</sup></b> Last day to take your first IRA required minimum distribution without penalty</li> <li><input type="checkbox"/> <b>15<sup>th</sup></b> Deadline to file your taxes or apply for an extension</li> <li><input type="checkbox"/> <b>15<sup>th</sup></b> Pay your Q1 estimated taxes</li> </ul>	<p><b>JUNE</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>15<sup>th</sup></b> Pay your Q2 estimated taxes</li> <li><b>21<sup>st</sup></b> First day of summer!</li> </ul>	<p><b>SEPTEMBER</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>15<sup>th</sup></b> Pay your Q3 estimated taxes</li> <li><input type="checkbox"/> <b>30<sup>th</sup></b> Last day to determine beneficiaries after an IRA owner's death</li> <li><input type="checkbox"/> <b>This Month</b> Begin final quarter tasks</li> </ul>
<p><b>OCTOBER</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>1<sup>st</sup></b> Extended trust and estate tax returns due</li> <li><input type="checkbox"/> <b>15<sup>th</sup></b> Medicare Advantage and drug plan open enrollment begins (ends Dec. 7)</li> <li><input type="checkbox"/> <b>15<sup>th</sup></b> Extended individual tax returns due</li> </ul>	<p><b>NOVEMBER</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>1<sup>st</sup></b> ACA open enrollment starts (ends Dec. 15th)</li> <li><input type="checkbox"/> <b>1<sup>st</sup></b> Turn your clocks back!</li> <li><input type="checkbox"/> <b>This Month</b> Medicare Advantage and drug plan open enrollment continues</li> </ul>	<p><b>DECEMBER</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>7<sup>th</sup></b> Deadline for Medicare Advantage and drug plan open enrollment</li> <li><input type="checkbox"/> <b>15<sup>th</sup></b> Deadline for ACA open enrollment</li> <li><input type="checkbox"/> <b>31<sup>st</sup></b> Last day for stocks, RMDs, itemized deductions, gifts to count for 2020 taxes</li> </ul>

\*This enrollment period allows you to test drive your Medicare Advantage 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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