2021 · IMPORTANT DATES

FINANCE STRATEGISTS

IMPORTANT DATES FOR INDIVIDUALS	
January 1	• Start of the tax year (calendar) and Q1 • Start of General Enrollment Period for Medicare Part A and Part B • Start of Open Enrollment Period for Medicare Advantage
January 15	• Q4 estimated payment deadline for prior year
January 31	• Income tax return (Form 1040) filing and payment deadline to avoid late penalty for Q4 estimate, if it was not timely paid
February 15	• Form W-4 filing deadline for taxpayers who claimed an exemption from income tax withholding for the prior year to continue their exemption in the current year
March 31	• End of Medicare General Enrollment Period
April 1	• Required Beginning Date (in year after year age 72 was reached) for RMDs • Start of Q2
April 15	• Income tax return (Form 1040) filing and payment deadline • Gift tax return (Form 709) filing and payment deadline • Request for automatic six-month extension (Form 4868) filing deadline to extend filing Form 1040 and 709 • Q1 estimated payment deadline • Deadline to contribute to an IRA or HSA for prior tax year
June 15	• Q2 estimated payment deadline
June 30	• Deadline to file FAFSA for prior academic year
July 1	• Start of Q3
September 15	• Q3 estimated payment deadline
September 30	• Determination date for identifying designated beneficiaries of retirement accounts (continue on next column)

IMPORTANT DATES FOR INDIVIDUALS (CONTINUED)	
October 1	• Start of Q4 • First day to file FAFSA for upcoming academic year
October 15	• Extended income tax return (Form 1040) and gift tax return (Form 709) filing deadline • Start of Open Enrollment Period for existing Medicare enrollees
November 1	• Start of Open Enrollment Period for Health Insurance Marketplace
December 7	• End of Open Enrollment Period for existing Medicare enrollees
December 15	• End of Open Enrollment Period for Health Insurance Marketplace
December 31	• Deadline for satisfying RMDs for current year • Deadline for dividing retirement accounts with multiple beneficiaries in order to use separate accounting • Deadline for completing gifts for tax year • End of tax year (calendar)

IMPORTANT DATES FOR BUSINESS TAXPAYERS	
January 1	• Start of the tax year (calendar) and Q1
January 15	• Q4 estimated payment deadline for prior year for sole proprietorships and single-member LLCs
January 31	• Various Forms 1099 and 1098 issuance deadline • Form W-2 issuance deadline
February 28	• Various Forms 1099 and other information returns paper filing deadline (continue on next page)

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IMPORTANT DATES FOR BUSINESS TAXPAYERS (CONTINUED)	
March 15	• Income tax return (Form 1120S) filing and payment deadline for calendar year S-corporations • Income tax return (Form 1065 or 1065-B) filing and payment deadline for calendar year multi-member partnerships and multi-member LLCs (default) • K-1 issuance deadline • Request for automatic six-month extension (Form 7004) filing deadline to extend filing Form 1120S, 1065, and 1065-B • S-corporation election (Form 2553) filing deadline to be treated as an S-corporation in the current year
March 31	• Various Forms 1099 and other information returns e-file deadline
April 1	• Start of Q2
April 15	• Income tax return (Form 1040) filing and payment deadline for sole proprietorships and single-member LLCs • Request for automatic six-month extension (Form 4868) filing deadline to extend filing Form 1040 • Income tax return (Form 1120) filing and payment deadline for calendar year C-Corporations and multi-member LLCs that elect to be classified as a corporation • Request for automatic six-month extension (Form 7004) filing deadline to extend filing Form 1120 • Q1 estimated payment deadline for sole proprietorships, single-member LLCs, C-corporations, and multi-member LLCs that elect to be treated as a corporation
June 15	• Q2 estimated payment deadline for sole proprietorships, single-member LLCs, C-corporations, and multi-member LLCs that elect to be treated as a corporation
July 1	• Start of Q3 (continue on next column)

IMPORTANT DATES FOR BUSINESS TAXPAYERS (CONTINUED)	
September 15	• Q3 estimated payment deadline for sole proprietorships, single-member LLCs, C-corporations, and multi-member LLCs that elect to be treated as a corporation • Extended income tax return (Form 1120S) filing deadline for calendar year S-corporations • Extended income tax return (Form 1065 or 1065-B) filing deadline for calendar year multi-member partnerships and multi-member LLCs (default)
October 1	• Start of Q4
October 15	• Extended income tax return (Form 1040) filing deadline for sole proprietorships and single-member LLCs • Extended income tax return (Form 1120) filing deadline for calendar year C-Corporations and multi-member LLCs that elect to be classified as a corporation
December 15	• Q4 estimated payment deadline for C-corporations and multi-member LLCs that elect to be treated as a corporation
December 31	• End of tax year (calendar)

Subject to exceptions due to individual circumstances, entity elections, and delays when deadlines fall on weekends or legal holidays.

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Important Fiscal Dates for Those in Pacifica, CA

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