# 2021 · IMPORTANT DATES

FINANCE STRATEGISTS

| IMPORTANT DATES FOR INDIVIDUALS | |
|---|---|
| **January 1** | • Start of the tax year (calendar) and Q1<br>• Start of General Enrollment Period for Medicare Part A and Part B<br>• 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<br>• Start of Q2 |
| **April 15** | • Income tax return (Form 1040) filing and payment deadline<br>• Gift tax return (Form 709) filing and payment deadline<br>• Request for automatic six-month extension (Form 4868) filing deadline to extend filing Form 1040 and 709<br>• Q1 estimated payment deadline<br>• 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<br>(continue on next column) |

| IMPORTANT DATES FOR INDIVIDUALS (CONTINUED) | |
|---|---|
| **October 1** | • Start of Q4<br>• 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<br>• 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<br>• Deadline for dividing retirement accounts with multiple beneficiaries in order to use separate accounting<br>• Deadline for completing gifts for tax year<br>• 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<br>• Form W-2 issuance deadline |
| **February 28** | • Various Forms 1099 and other information returns paper filing deadline<br>(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<br>• Income tax return (Form 1065 or 1065-B) filing and payment deadline for calendar year multi-member partnerships and multi-member LLCs (default)<br>• K-1 issuance deadline<br>• Request for automatic six-month extension (Form 7004) filing deadline to extend filing Form 1120S, 1065, and 1065-B<br>• 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<br>• Request for automatic six-month extension (Form 4868) filing deadline to extend filing Form 1040<br>• 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<br>• Request for automatic six-month extension (Form 7004) filing deadline to extend filing Form 1120<br>• 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<br>(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<br>• Extended income tax return (Form 1120S) filing deadline for calendar year S-corporations<br>• 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<br>• 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 Washington, PA

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