

KEY PLANNING & INVESTMENT DEADLINES

SPRING 2016

Laura Thompson
Investment Executive
Exchange Investment Services, Inc.

250 West Hancock Street
Milledgeville, GA 31061

lthompson@infinexgroup.com
<http://www.exchangebankshares.com/index.da>



FINANCIAL DATES & DEADLINES

SPECIAL OBSERVANCES

APRIL FOCUS: Social Security

April 1. Last day of grace period for first IRA required minimum distribution
April 18. File 2015 tax returns or extension
April 18. 1Q 2016 estimated taxes due
April 18. Last day to open IRA for 2015
April 18. Last day to contribute to Coverdell, IRA, profit sharing plans, or HSA for 2015

Financial Literacy Month
April 4. NCAA Men's Basketball Championship
April 4-10. The Masters Tournament
April 18. Boston Marathon
April 27. Administrative Professionals Day
April 29. Teach Your Children to Save Day

When should you
apply for
Social Security?

MAY FOCUS: Investor Skills

May 15. 2015 non-profit returns due
May 30. Memorial Day (markets closed)

Military Appreciation Month
May 2-6. Teacher Appreciation Week
May 6-7. Kentucky Derby
May 8. Mother's Day
May 20. NASCAR Day

Planning a killer vacation?
Major purchase?
I can help!

JUNE FOCUS: Cybersecurity

June 15. 2Q 2016 estimated taxes due
June 15. Last day for US citizens living abroad to file returns
June 30. FAFSA closes

June 5. Cancer Survivors Day
June 19. Father's Day
June 13-19. U.S. Open Golf Championship
June 27. Wimbledon tennis begins

Is your identity
at risk?

IF YOU HAVE ANY QUESTIONS ABOUT THIS OR ANYTHING ELSE, PLEASE CALL US!
(478) 457-2234

Laura Thompson
Investment Executive
Exchange Investment Services, Inc.

250 West Hancock Street
Milledgeville, GA 31061

(478) 457-2234

lthompson@infinexgroup.com

<http://www.exchangebankshares.com/index.da>

Questions? Please call (478) 457-2234

Investment and insurance products and services are offered by INFINEX INVESTMENTS, INC. Member FINRA/SIPC. Exchange Investment Services, Inc. is a subsidiary of Exchange Bank. Infinex is not affiliated with either entity. Neither Exchange Investment Services, Inc. or Infinex Investments, Inc. provide tax advice. Consult your tax advisor for your particular situation. NOT FDIC-INSURED. NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY. NOT GUARANTEED BY THE BANK. MAY GO DOWN IN VALUE.