
MARINER

Wealth Planning Calendar for P&G Employees

JANUARY

- Earnings Dates
- Savings Plan Contribution Reset
- Tax Planning

FEBRUARY

- PG Dividend Payment Dates
- Long-Term Incentive Program Awards

MARCH

- Tax Filing Preparation

Quarter End

APRIL

- Earnings Dates
- Tax Filing Preparation

MAY

- PG Dividend Payment Dates

JUNE

- End of Fiscal Year: June 30th

Fiscal Year End

JULY

- Earnings Dates
- Annual PST Contribution

AUGUST

- PG Dividend Payment Dates
- Long-Term Incentive Program Awards
- STAR Award

SEPTEMBER

- STAR Award

Quarter End

OCTOBER

- Earnings Dates
- Benefits Open Enrollment
- Long-Term Incentive Program Awards

NOVEMBER

- PG Dividend Payment Dates
- Benefits Open Enrollment
- STAR Award

DECEMBER

- Tax Planning

Quarter End

Earnings Dates

January, April, July, October

- Quarterly earnings released.
- Ex-dividend dates fall in these months.

PG Dividend Payment Dates

February, May, August, November

- PG's quarterly dividend payment dates.

Benefits Open Enrollment

October - November

- Review benefits guide and discuss with wealth advisor.
- Update elections.
- Consider fringe benefits such as ARAG Legal Plan.

Long-Term Incentive Program Awards

February

- Awards granted prior to 2022 updates vest in February 2024.

August

- Election emails released, with information regarding balance between restricted stock units and stock options.

October

- Chosen LTIP Awards are granted.

STAR Award

August

- Employees are notified of STAR award multiplier.

September

- STAR awards are granted; Paid in cash or granted as stock options.

November

- Employees elect cash or options.

Savings Plan Contribution Reset

January

- At the turn of the calendar year, employees who maxed out their savings plan for the year prior may contribute again.
- Consider outside IRA funding annually.

Annual PST Contribution

July

- P&G makes it's annual contribution of stock to employee's PST Plan. Consider diversification options at this point annually once eligible at age 50.
- Tax filing preparation.

March - April

- Gather necessary documentation for annual filing
- Review final return with wealth advisor.

Tax Planning

January

- Examine withholdings from prior year and adjust as needed.
- Consider charitable donations for calendar year.
- Consider Traditional vs. Roth funding.

December

- End-of year tax loss harvesting.

End of Fiscal Year: June 30th

June 30th

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