



FP Ferrie Petruccelli
Wealth Management Group

BMO Nesbitt Burns

April 2023 Newsletter

In our Spring newsletter we provide a checklist for reviewing your wealth plan, a summary of the most recent Federal Budget, and some practical tax savings strategies for 2023.

Wealth Plan Review

It is wise to review your wealth plan occasionally. This [summary](#) offers steps that are worth considering to enhance your estate and save taxes.

Tax Tips 2023

[Tax Tips for Investors](#), updated for 2023, provides information on tax strategies available that you may want to consider incorporating into your wealth management planning.

Federal Budget 2023

The 2023 Federal Budget was recently announced. This [summary](#) provides a brief review of the important points.

If you have any questions about this summary or your investment portfolio, please call us.

Sincerely,

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