March 2024 Newsletter

As the April 30, 2024, personal tax return filing deadline approaches, it is important to be prepared. To assist, we are sending two helpful summaries.

The **2024 Tax Calendar** summarizes important dates on the tax calendar and offers some tips to help you with your overall wealth planning. Of special note, for those with trusts, there are new rules that apply this year. This **summary** explains more.

The **2023 Tax Income Tax Checklist** will help you prepare your 2023 tax return and maximize tax savings.

Sincerely,

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