

MAT #43054804

Publisher's Note

2023 — Release 2

Previous release was 2023-1

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D. Field

Guide to Personal Financial Planning

This second release for 2023 to the **Guide to Personal Financial Planning** adds updated and enhanced content to help ensure the Guide is a valuable resource to support financial planning professionals in their day-to-day work.

Commentary Highlights

A **Tax-Free First Home Savings Account (FHSA) Contribution Room Worksheet** has been introduced in the Chapter 5 Appendix (5K).

This release also outlines the latest professional and legislative developments that have taken place since our last update, and includes the following items:

- 2023 Federal Budget Summary.
- CRA increases prescribed rate to 5% as of March 27, 2023.
- Bank of Canada rate announcements in March.

As always, your questions or comments are welcomed.