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Publisher's Note

2024 — Release 4

Previous release was 2024-3

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Guide to Personal Financial Planning

This fourth release for 2024 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

The Key Facts and Figures chapter has been updated to reflect the changes with Old Age Security and the Guaranteed Income Supplement.

Updates to alternative minimum tax (AMT) in **Chapter 7 — Tax Planning**; rules that came into effect on June 20, 2024.

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

- CRA keeps the prescribed rate at 5% as of October 1, 2024.
- Bank of Canada rate announcements in July and September.

As always, your questions or comments are welcome.

GUIDE TO PERSONAL FINANCIAL PLANNING

2024 – Release 4

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FILING INSTRUCTIONS

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