



Smith Falconer Financial Group

October 2018 eUpdate

Year-End Tax-Planning Checklist

The new school year has launched, and as your Investment Advisory team, we are already thinking about the financial year-end! Our clients enjoy "checklists" like the one we share for tax filing every year. Now is a good time to consider taking action, before year-end, to save on 2018 taxes. We encourage you to reference our "Year-End Tax-Planning Checklist" article on page 2 in our [Q4 Perspective Newsletter](#). We will bring tax-saving opportunities to your attention in the coming months as we review portfolios.

Very best regards,
CIBC Wood Gundy

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