

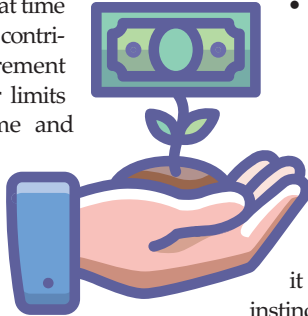
SPRING FORWARD WITH CANON CAPITAL

With 2023 in full swing, it's a good time to consider these tips from our Wealth Management and Technologies divisions.

Wealth Management

Here are a few actions you might consider taking to make the most of your finances during tax season.

- A down market is a great time to make the maximum contribution to your retirement account. Confirm your limits based on your income and plan type and check with your CPA, then make a one-time pay deferral or contribution.
- You have up until the tax filing deadline (or extension) to make contributions for 2022; be sure to claim and report transactions for the proper tax year.
- Consider investing your tax refund: volatile markets are a great opportunity to buy at lower prices, making room for future growth. Treasuries also offer attractive short-term rates that could help you ride out a few months' uncertainty.



Technologies

Hackers and online scammers are not slowing down. Keep your information safe with these recommendations:

- Tax scams continue. Keep an eye and ear out for suspicious emails and calls, especially those that you aren't expecting.
- Watch out for social media ads that lead you to fake online stores. If it sounds too good to be true, it just might be. Trust your instincts.
- Stay safe online with a password manager, like Bitwarden. If you're using a password manager, it's a good idea to change your master password and review your settings.

One source, many services, the right decision.

We are here to help. If you have any questions, please visit canoncapital.com or call 215.723.4881.

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