

24.1 Release

March 7th, 2024

NaviPlan Classic by Investcloud v24.1 contains updates to federal and provincial taxes, Presentation Module content updates, Morningstar data, and miscellaneous fixes.

- [Tax Updates](#)
- [Presentation Module Content Updates](#)
- [Morningstar Data Update](#)

Details

Tax Updates

2024 Federal Tax Updates

- Federal and provincial tax calculations in NaviPlan Classic by InvestCloud have been updated to provide the most up-to-date analysis. For more information on these changes, see the [2024 CDN Tax Update](#) document

Provincial Tax Updates

- Tax rates, brackets, limits, and other details updated for Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland, Nova Scotia, Ontario, Prince Edward Island, Quebec, Saskatchewan, and Yukon provinces

Presentation Module Updates

- The following presentations have had text, charts, and graphs updated with more recent statistics:
 - *The Road to Retirement*
 - *Income Planning for Retirees*
 - *Planning to Protect*
 - *Life Insurance Quick Assessment*
 - *Planning for your family's education*

Morningstar Data Update

- The Morningstar Asset Classifier Database has been updated to reflect Q4 2023 reference data

Supported platforms for 24.1

Applications:

- Microsoft® Word: version 2013, 2016
- Adobe Reader®: version 11.0+

Display:

- 1280 x 720 or higher

Browsers:

- Apple® Safari
- Google® Chrome
- Microsoft® Edge
- Mozilla Firefox®