

BMO Wealth Management BMO InvestorLine

Accessing Tax Documents

InvestorLine Self-Directed



- 1) Log in to your InvestorLine account
- 2) Select 'Documents' (found under the portfolio performance graph)
- 3) Select 'eDocuments'

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		HOLDINGS DETAILS TRANS	ACTION HISTORY FOR		FORMANCE V MYLIN			
		Holdings summary		eDocuments	_	Account news		
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4) Select 'Tax Documents'

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	2024	09 Jan 2025	RRSP Contribution Receipts	- Remainder of the Year
Download 0.00 / 4 MB Selected	1			
✓ Legal disclaimer				

- 5) All available Tax documents will be visible in table form
- 6) To download the desired Tax document, select the year of interest, from the Tax Year dropdown, and then click on the document name
- 7) To download multiple documents, click on the check boxes on the left of the account number and press download

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✓ Legal disclaimer			



8) If you do not see the desired tax document or believe it is missing, select 'When will my tax documents become available' to confirm the availability schedule (a separate pop-up will appear on the screen)

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Note: Tax documents are only accessible via desktop browser currently.

InvestorLine

BMO

Let's connect

We're available Monday to Friday to answer your questions.

Call us – 8 a.m. to 6 p.m. ET 1-888-776-6886

Chat with us - 8 a.m. to 8 p.m. ET

Learn More **bmo.com/online-investing**



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