BMO

BMO Wealth Management

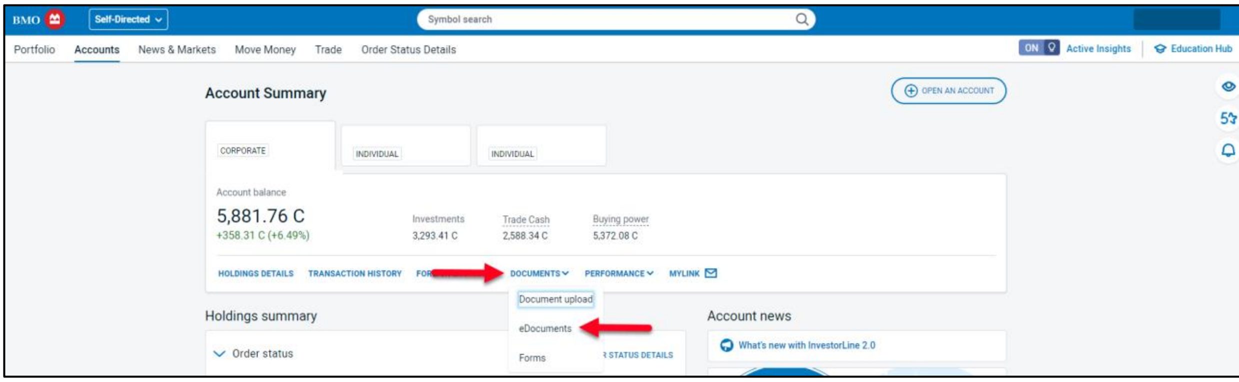
BMO InvestorLine

Accessing Tax Documents

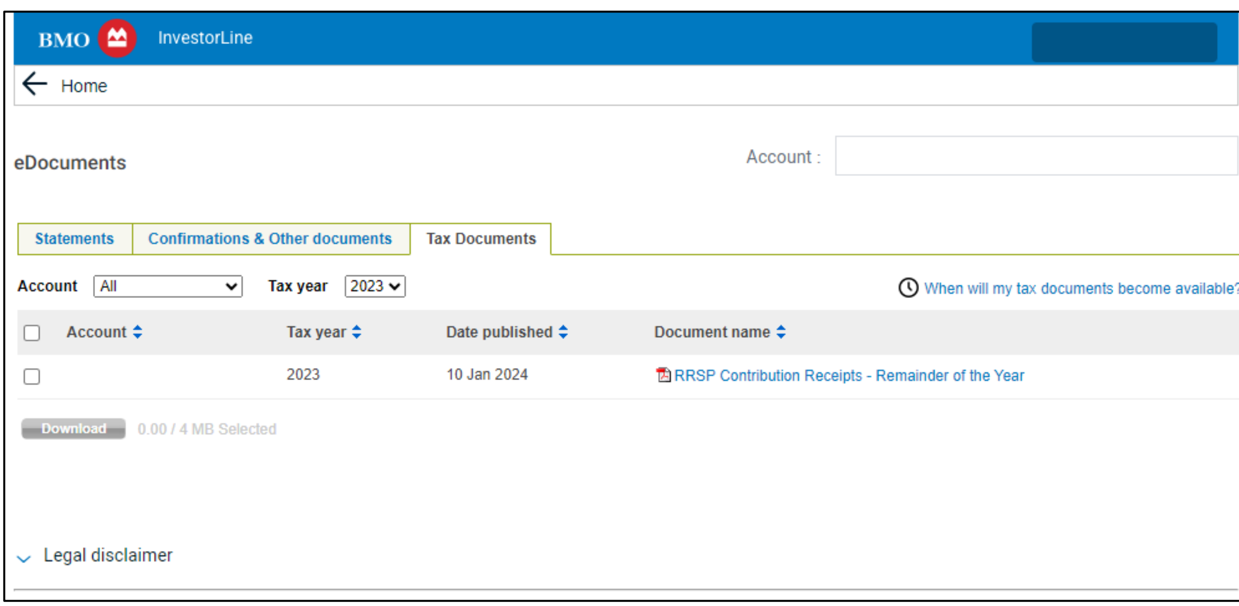
InvestorLine Self-Directed

BMO Wealth Management
BMO InvestorLine

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



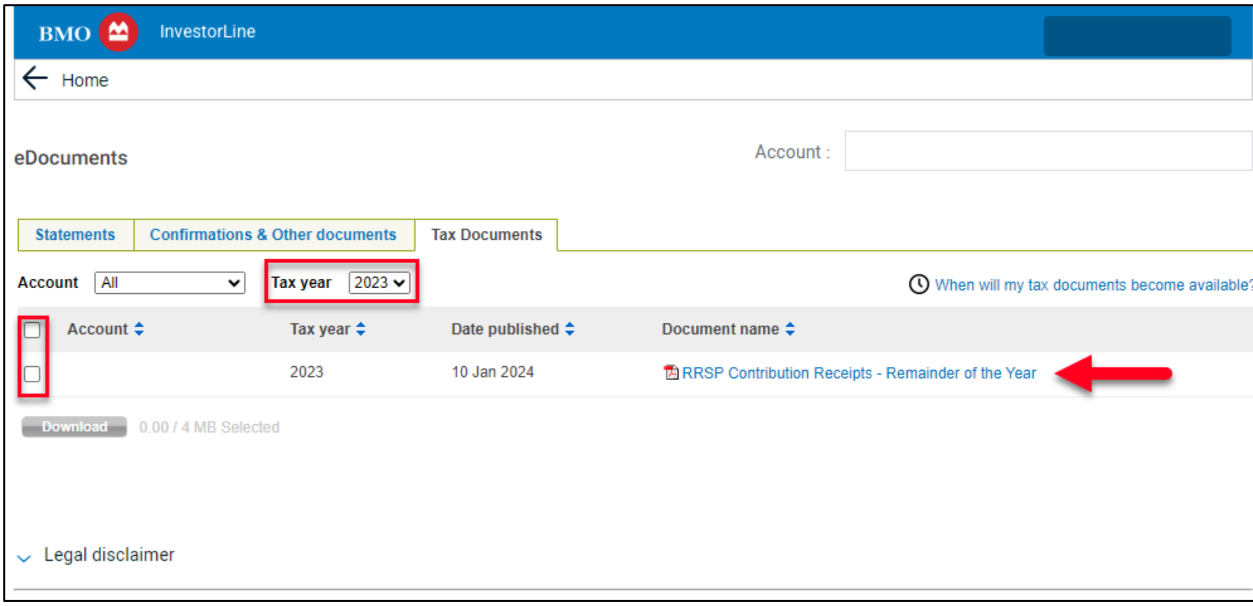
4) Select 'Tax Documents'



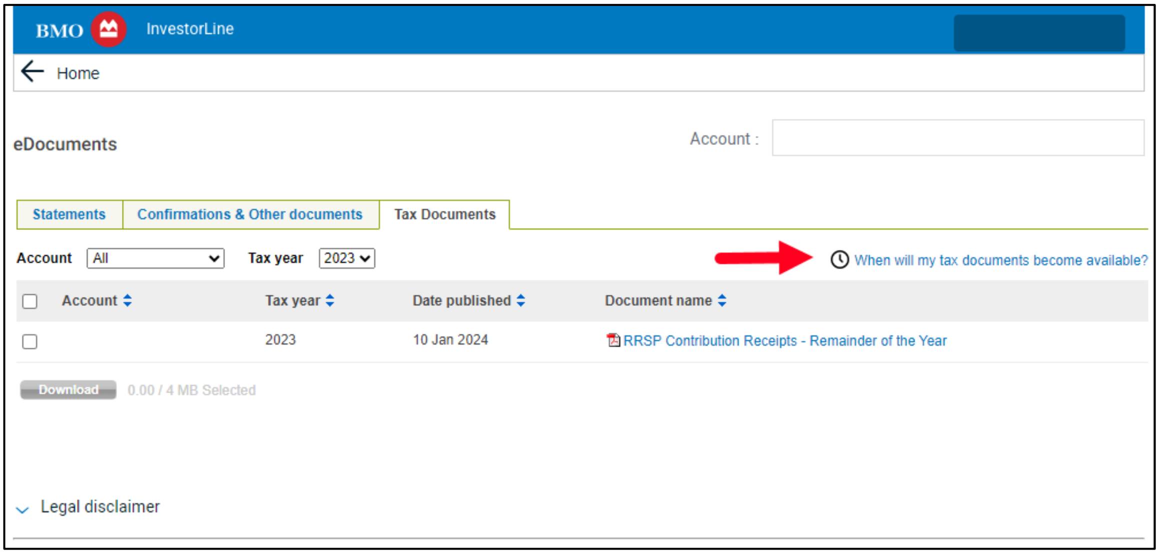
5) All available Tax documents will be visible in table form

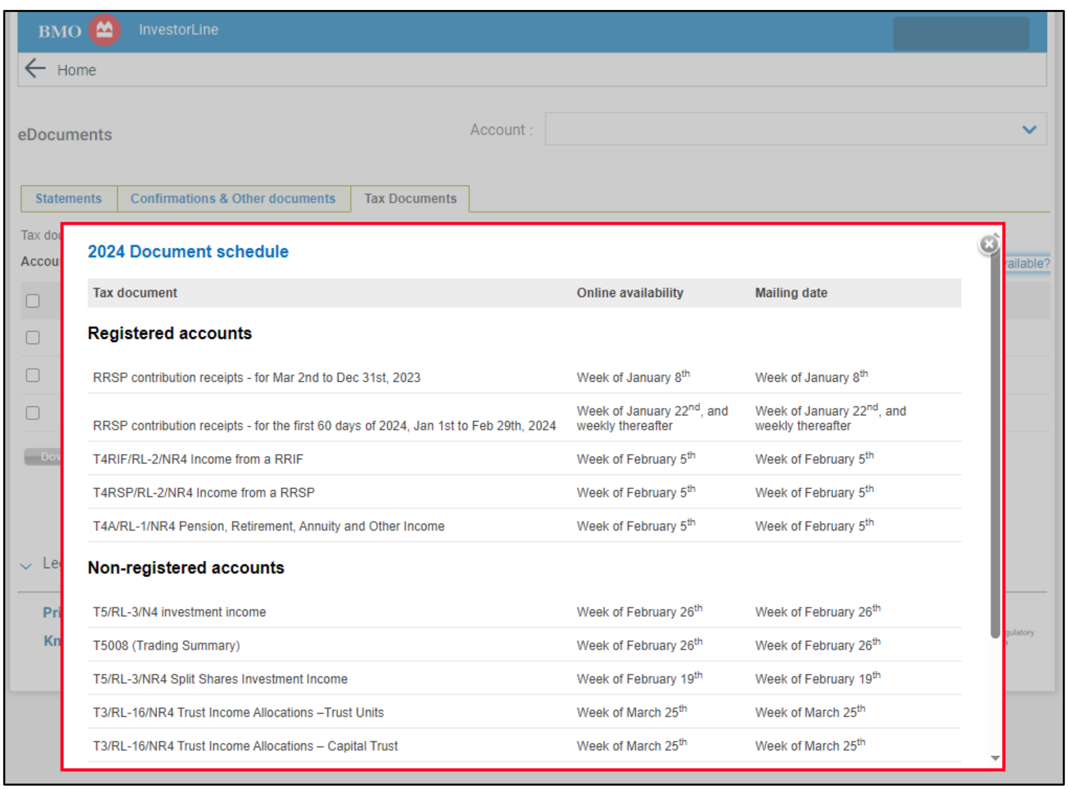
6) To download the desired Tax document, select the year of interest, from the Tax Year dropdown, and then click on the document name

7) To download multiple documents, click on the check boxes on the left of the account number and press download



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)





Tax document	Online availability	Mailing date
Registered accounts		
RRSP contribution receipts - for Mar 2nd to Dec 31st, 2023	Week of January 8th	Week of January 8th
RRSP contribution receipts - for the first 60 days of 2024, Jan 1st to Feb 29th, 2024	Week of January 22nd, and weekly thereafter	Week of January 22nd, and weekly thereafter
T4RIF/RL-2/NR4 Income from a RRIF	Week of February 5th	Week of February 5th
T4RSP/RL-2/NR4 Income from a RRSP	Week of February 5th	Week of February 5th
T4A/RL-1/NR4 Pension, Retirement, Annuity and Other Income	Week of February 5th	Week of February 5th
Non-registered accounts		
T5/RL-3/N4 investment income	Week of February 26th	Week of February 26th
T5008 (Trading Summary)	Week of February 26th	Week of February 26th
T5/RL-3/NR4 Split Shares Investment Income	Week of February 19th	Week of February 19th
T3/RL-16/NR4 Trust Income Allocations –Trust Units	Week of March 25th	Week of March 25th
T3/RL-16/NR4 Trust Income Allocations – Capital Trust	Week of March 25th	Week of March 25th

Note:

(1) Tax documents are only accessible via desktop browser currently.

Let’s connect

We’re available Monday to Friday between 8 a.m. and 6 p.m. (ET) to answer your questions.

Call us
1-888-776-6886

Chat with us

Learn More
bmo.com/online-investing

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