



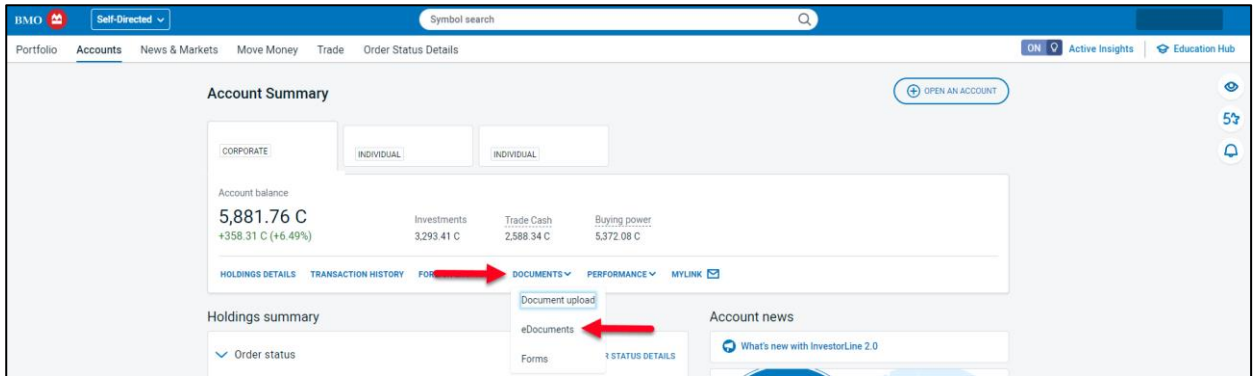
**BMO Wealth
Management**
BMO InvestorLine

Accessing Tax Documents

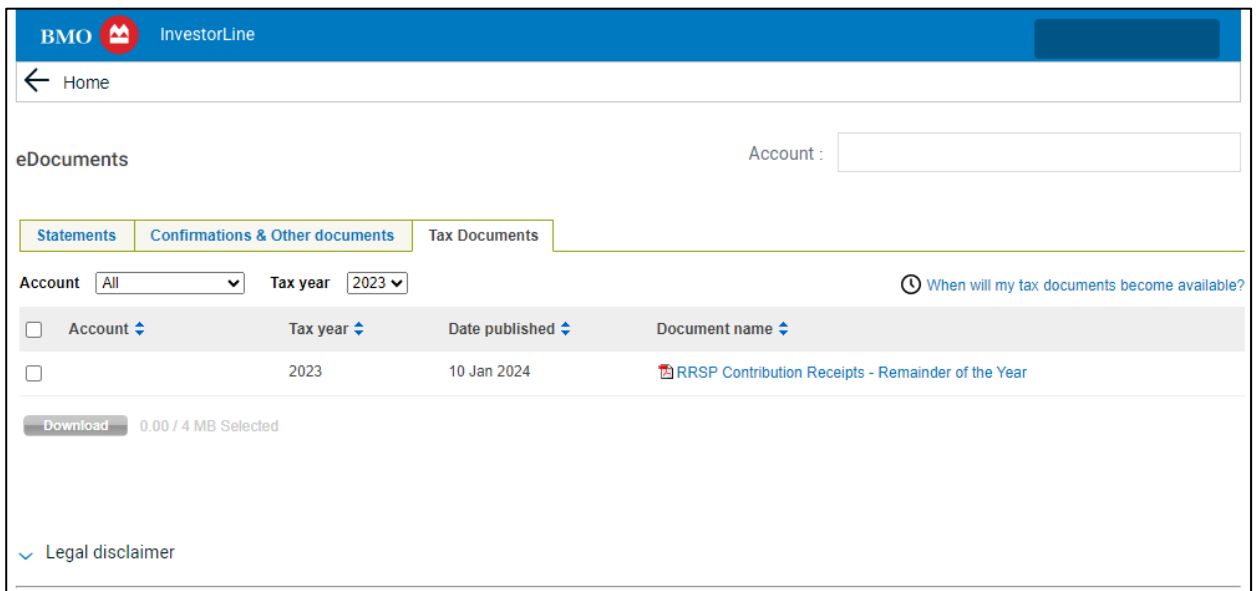


InvestorLine Self-Directed

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



- 4) Select 'Tax Documents'

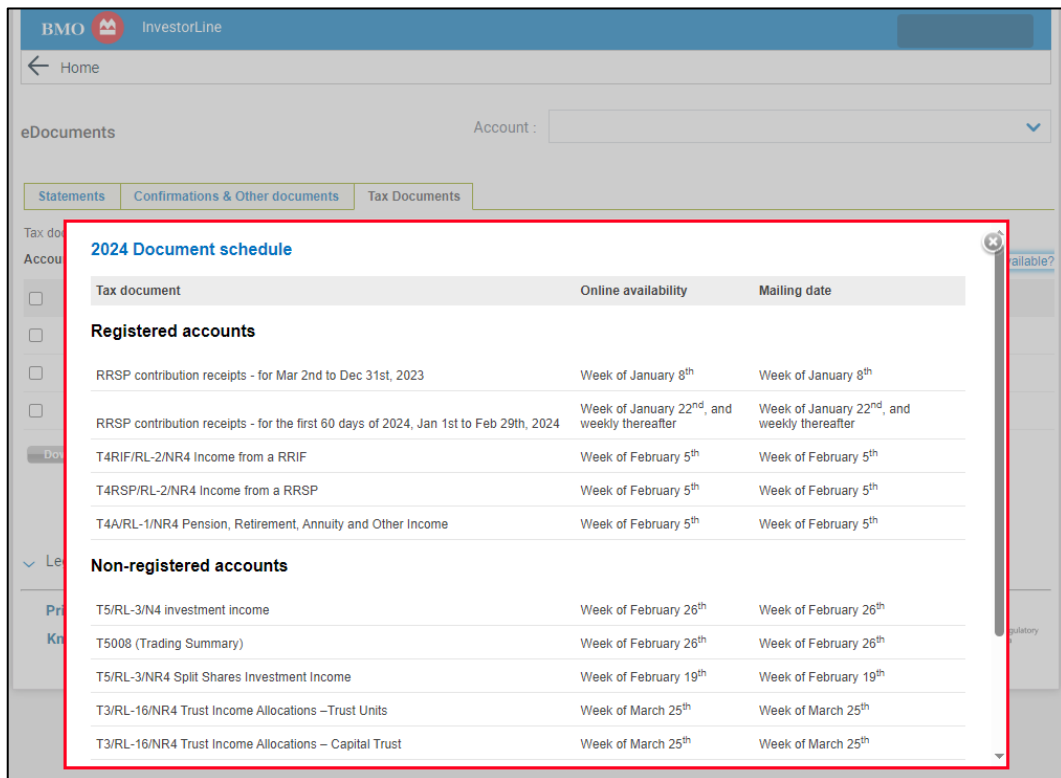
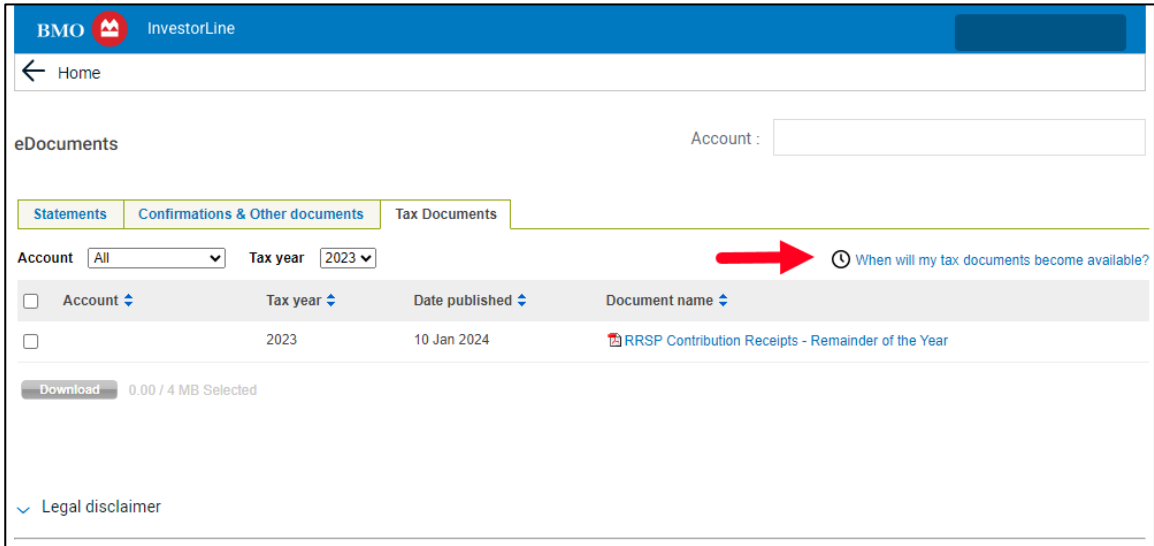


- 5) All available Tax documents will be visible in table form
- 6) To download the desired Tax document, select the year of interest, from the Tax Year dropdown, and then click on the document name
- 7) To download multiple documents, click on the check boxes on the left of the account number and press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

The screenshot shows the BMO InvestorLine interface. At the top, there is a blue header with the BMO logo and 'InvestorLine' text. Below the header is a navigation bar with a 'Home' link. The main content area is titled 'eDocuments' and includes an 'Account:' field. There are three tabs: 'Statements', 'Confirmations & Other documents', and 'Tax Documents'. The 'Tax Documents' tab is active. Below the tabs, there are two dropdown menus: 'Account' (set to 'All') and 'Tax year' (set to '2023'). To the right of these dropdowns is a clock icon and the text 'When will my tax documents become available?'. Below this is a table with the following columns: 'Account', 'Tax year', 'Date published', and 'Document name'. The table contains one row with the following data: 'Account' (checkbox), '2023', '10 Jan 2024', and 'RRSP Contribution Receipts - Remainder of the Year'. A red arrow points to the document name. Below the table is a 'Download' button and the text '0.00 / 4 MB Selected'. At the bottom left, there is a 'Legal disclaimer' link.

Account	Tax year	Date published	Document name
<input type="checkbox"/>	2023	10 Jan 2024	RRSP Contribution Receipts - Remainder of the Year

- 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)



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

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