



InvestorLine

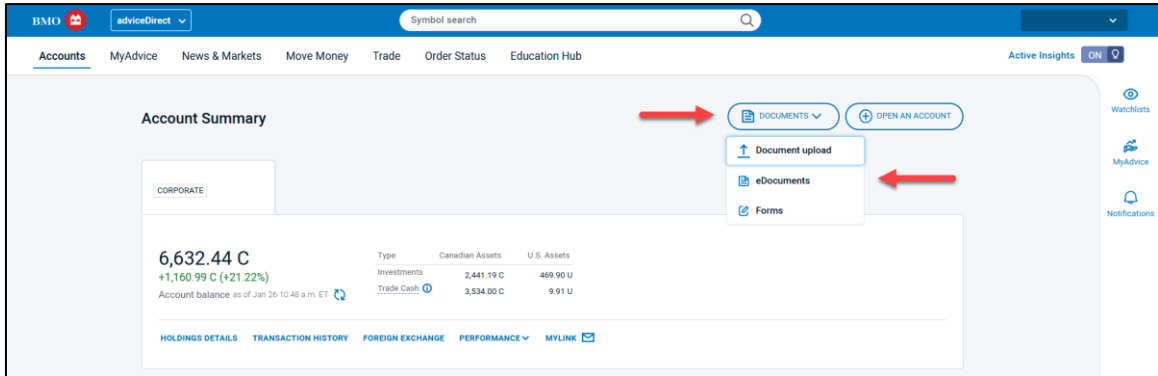
BMO InvestorLine adviceDirect

Accessing Tax Documents

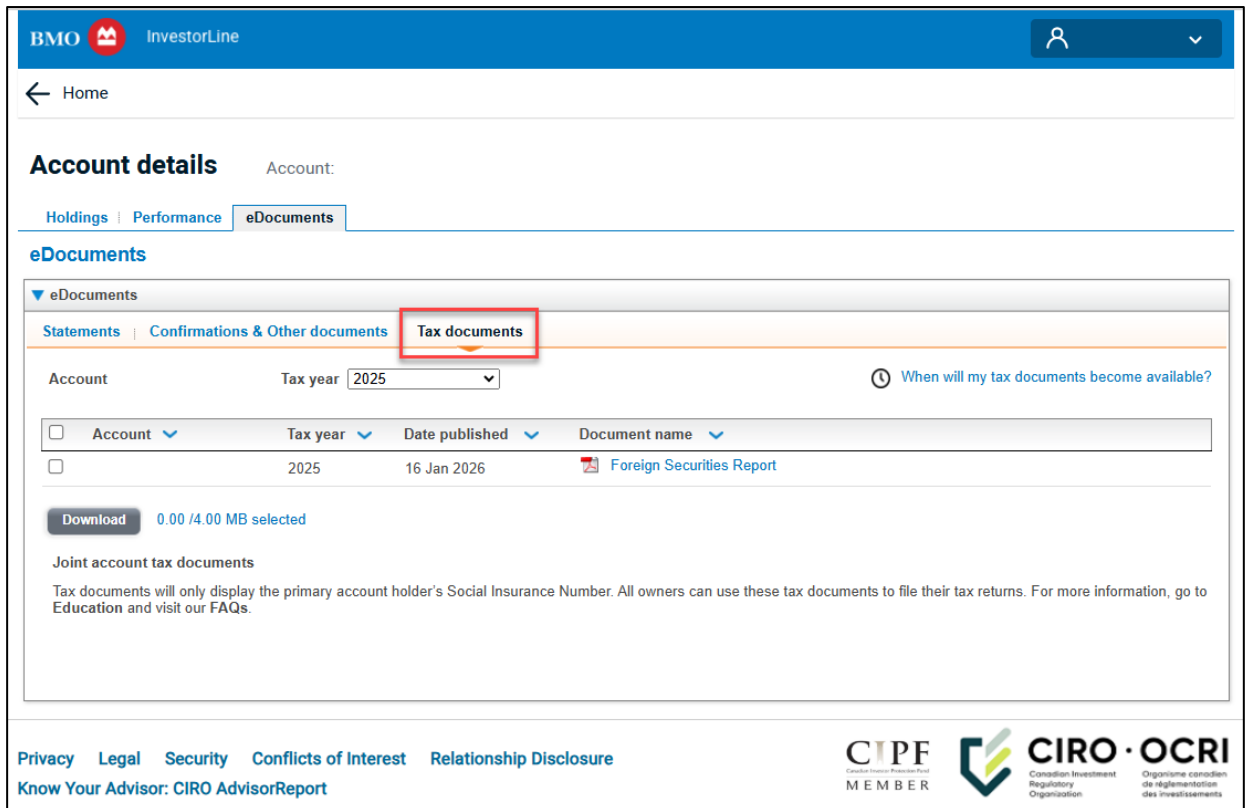


BMO InvestorLine adviceDirect

- 1) Log in to your adviceDirect account
- 2) Select 'Documents'
- 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 displays the BMO InvestorLine interface. At the top, the BMO logo and 'InvestorLine' text are visible. Below the navigation bar, the 'Account details' section is active, with tabs for 'Holdings', 'Performance', and 'eDocuments'. The 'eDocuments' section is expanded, showing a dropdown menu for 'Tax documents'. A 'Tax year' dropdown menu is set to '2025'. Below this, a table lists available documents. The first document is a 'Foreign Securities Report' published on '16 Jan 2026'. A 'Download' button is visible, indicating '0.00 / 4.00 MB selected'. The footer contains links for 'Privacy', 'Legal', 'Security', 'Conflicts of Interest', and 'Relationship Disclosure', along with logos for CIPF, CIRO, and OCRI.

Account details Account:

Holdings | Performance | **eDocuments**

eDocuments

▼ eDocuments

Statements | Confirmations & Other documents | **Tax documents**

Account Tax year [When will my tax documents become available?](#)

<input type="checkbox"/>	Account ▼	Tax year ▼	Date published ▼	Document name ▼
<input type="checkbox"/>		2025	16 Jan 2026	Foreign Securities Report

Download 0.00 / 4.00 MB selected

Joint account tax documents

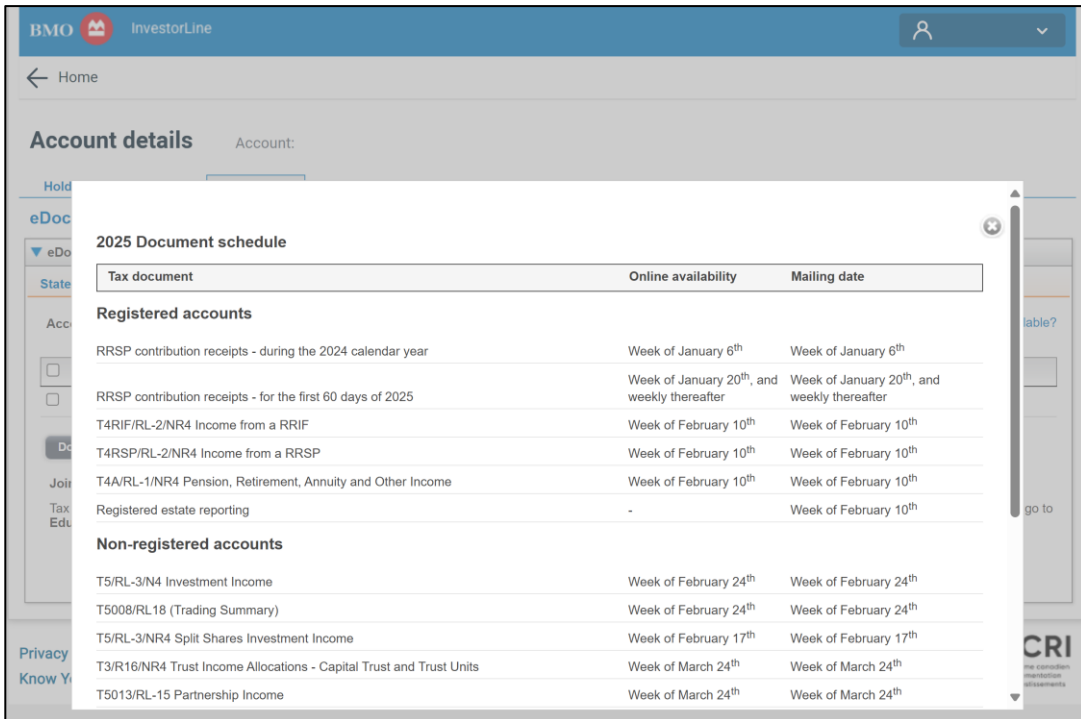
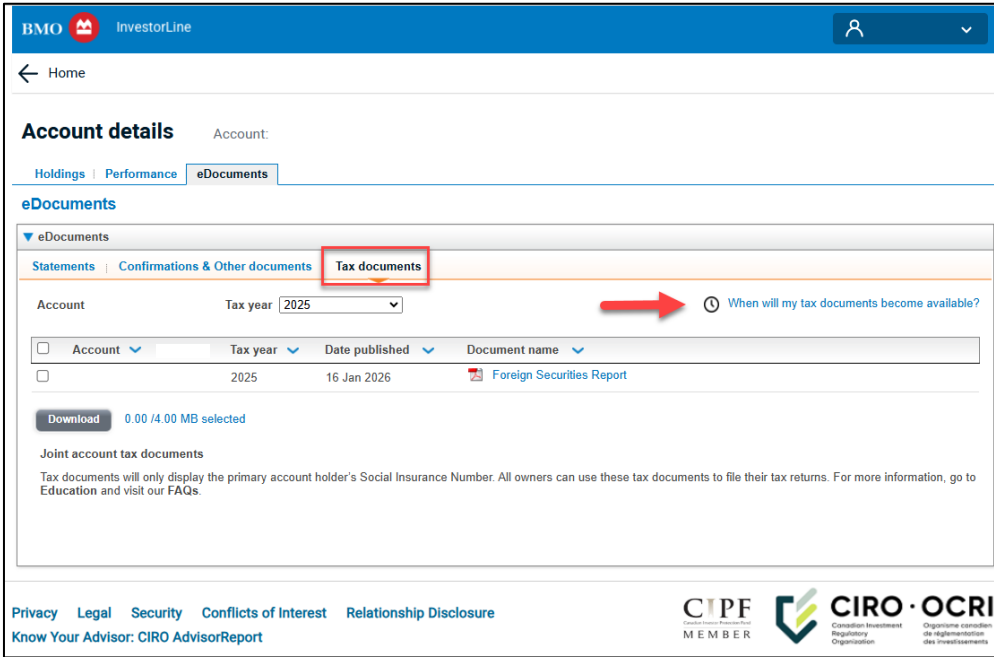
Tax documents will only display the primary account holder's Social Insurance Number. All owners can use these tax documents to file their tax returns. For more information, go to Education and visit our FAQs.

Privacy | Legal | Security | Conflicts of Interest | Relationship Disclosure
Know Your Advisor: CIRO AdvisorReport

CIPF Canadian Investor Protection Fund
MEMBER

CIRO · OCRI
Coalition Investment
Regulatory
Organization
Organisme canadien
de réglementation
des investissements

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

Let's connect

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



Call us – 8 a.m. to 6 p.m. ET
1-844-274-3762



Chat with us – 8 a.m. to 8 p.m. ET

Learn More
[bmo.com/online-investing](https://www.bmo.com/online-investing)



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