



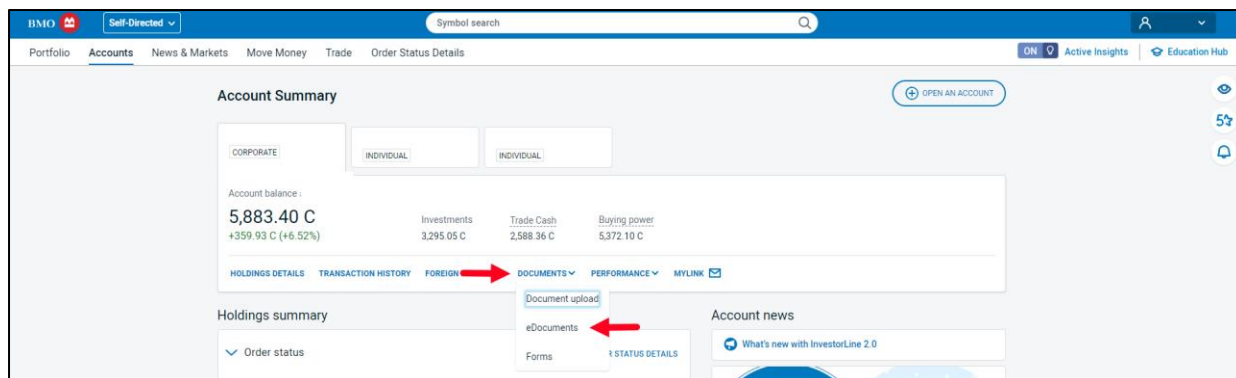
**BMO Wealth
Management**
BMO adviceDirect

Accessing Tax Documents

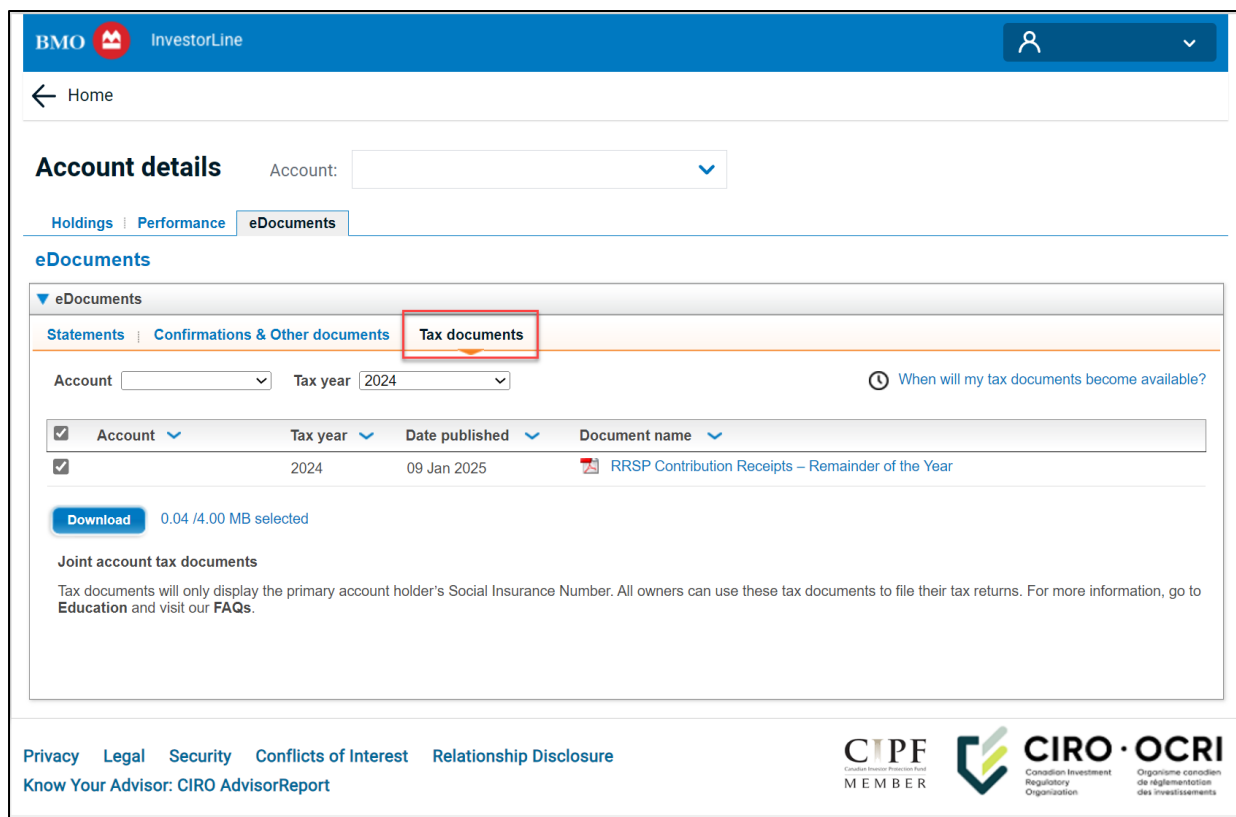


adviceDirect

- 1) Log in to your adviceDirect 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 displays the BMO InvestorLine interface. At the top, the BMO logo and 'InvestorLine' text are on the left, and a user profile icon is on the right. Below the header, a 'Home' link with a back arrow is visible. The main section is titled 'Account details' and includes an 'Account:' dropdown menu. Below this, there are tabs for 'Holdings', 'Performance', and 'eDocuments', with 'eDocuments' being the active tab. Under 'eDocuments', there are sub-tabs for 'Statements', 'Confirmations & Other documents', and 'Tax documents', with 'Tax documents' selected. The 'Tax documents' section features an 'Account' dropdown and a 'Tax year' dropdown set to '2024'. To the right of these dropdowns is a link: 'When will my tax documents become available?'. Below the dropdowns is a table with columns: 'Account', 'Tax year', 'Date published', and 'Document name'. The first row of the table has a checked checkbox in the 'Account' column, the year '2024' in the 'Tax year' column, the date '09 Jan 2025' in the 'Date published' column, and the document name '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 '0.04 /4.00 MB selected'. At the bottom of the main content area, there is a section titled 'Joint account tax documents' with explanatory text. The footer contains links for 'Privacy', 'Legal', 'Security', 'Conflicts of Interest', and 'Relationship Disclosure', along with the text 'Know Your Advisor: CIRO AdvisorReport'. On the right side of the footer are the logos for CIPF (Canadian Investor Protection Fund) and CIRO · OCRI (Canadian Investment Regulatory Organization / Organisme canadien de réglementation des investissements).

BMO InvestorLine

Account: [dropdown]

Holdings | Performance | eDocuments

eDocuments

▼ eDocuments

Statements | Confirmations & Other documents | Tax documents

Account [dropdown] Tax year [2024] When will my tax documents become available?

<input checked="" type="checkbox"/>	Account	Tax year	Date published	Document name
<input checked="" type="checkbox"/>		2024	09 Jan 2025	RRSP Contribution Receipts – Remainder of the Year

Download 0.04 /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 Canadian 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)

BMO InvestorLine

Home

Account details Account: [dropdown]

Holdings | Performance | **eDocuments**

eDocuments

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

Account [dropdown] Tax year [2024]

When will my tax documents become available?

Account	Tax year	Date published	Document name
[checkbox]	[dropdown]	[dropdown]	[dropdown]
[checkbox]	2024	09 Jan 2025	RRSP Contribution Receipts – Remainder of the Year

Download 0.04 / 4.00 MB selected

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Privacy Legal Security Conflicts of Interest Relationship Disclosure
Know Your Advisor: [CIRI AdvisorReport](#)

CIPF MEMBER **CIRI** **OCRI**

2025 Document schedule

Tax document	Online availability	Mailing date
Registered accounts		
RRSP contribution receipts - during the 2024 calendar year	Week of January 6 th	Week of January 6 th
RRSP contribution receipts - for the first 60 days of 2025	Week of January 20 th , and weekly thereafter	Week of January 20 th , and weekly thereafter
T4RIF/RL-2/NR4 Income from a RRIF	Week of February 10 th	Week of February 10 th
T4RSP/RL-2/NR4 Income from a RRSP	Week of February 10 th	Week of February 10 th
T4A/RL-1/NR4 Pension, Retirement, Annuity and Other Income	Week of February 10 th	Week of February 10 th
Registered estate reporting	-	Week of February 10 th
Non-registered accounts		
T5/RL-3/N4 Investment Income	Week of February 24 th	Week of February 24 th
T5008/RL18 (Trading Summary)	Week of February 24 th	Week of February 24 th
T5/RL-3/NR4 Split Shares Investment Income	Week of February 17 th	Week of February 17 th
T3/R16/INR4 Trust Income Allocations - Capital Trust and Trust Units	Week of March 24 th	Week of March 24 th
T5013/RL-15 Partnership Income	Week of March 24 th	Week of March 24 th

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



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