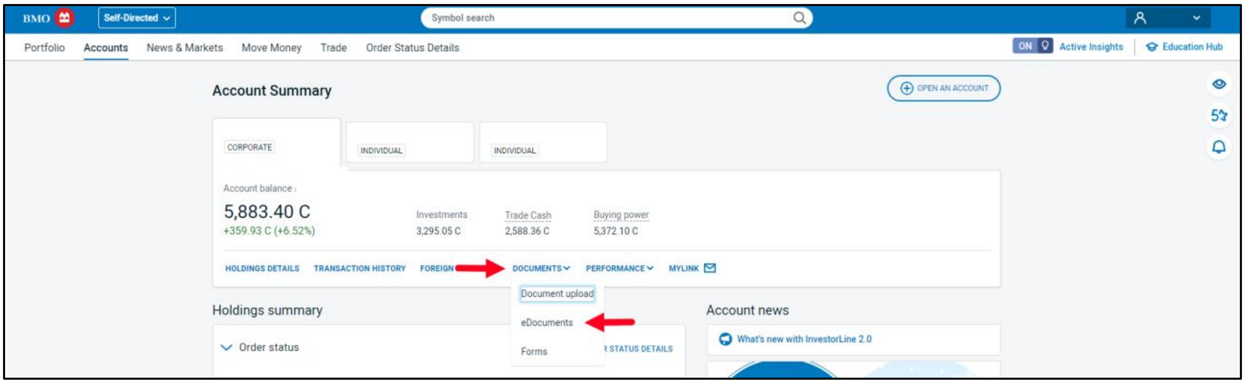
BMO Wealth Management

BMO adviceDirect

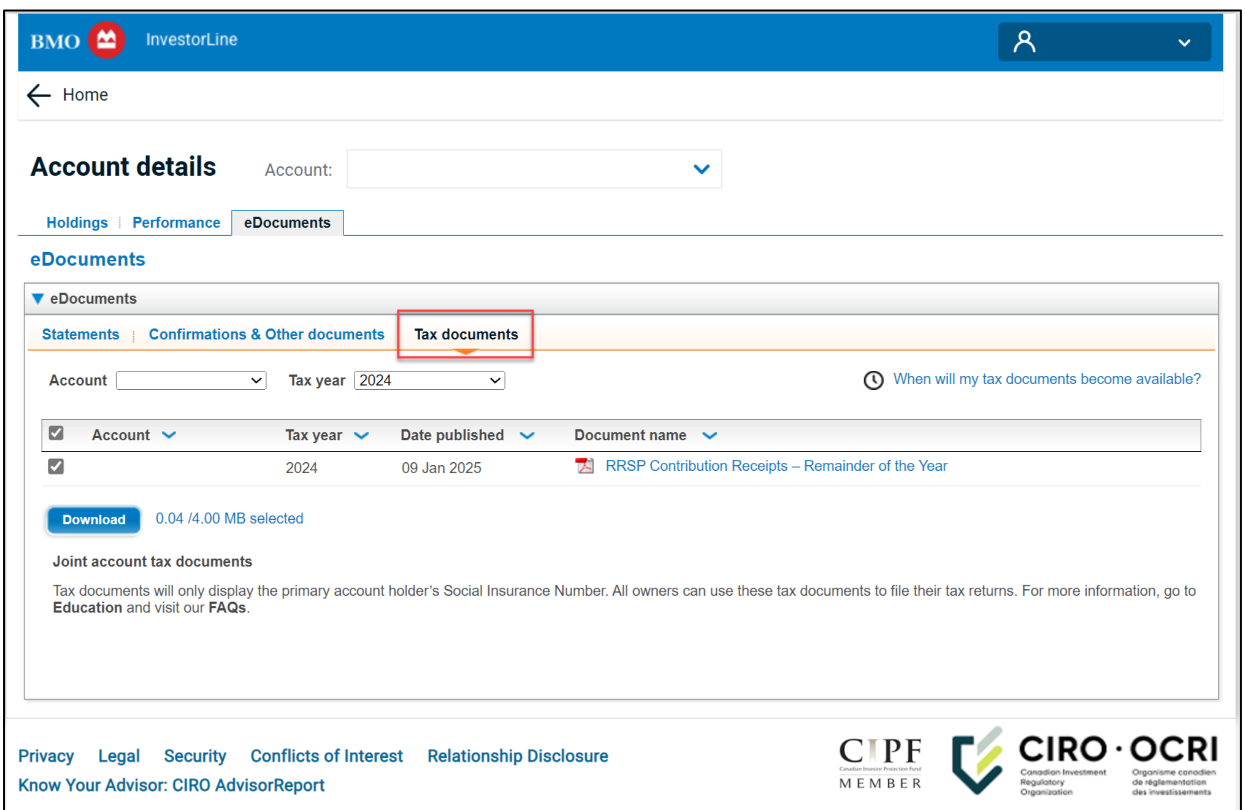
Accessing Tax Documents

adviceDirect

1) Log in to your adviceDirect account
2) Select ‘Documents’ (found under the portfolio performance graph)
3) Select ‘eDocuments’



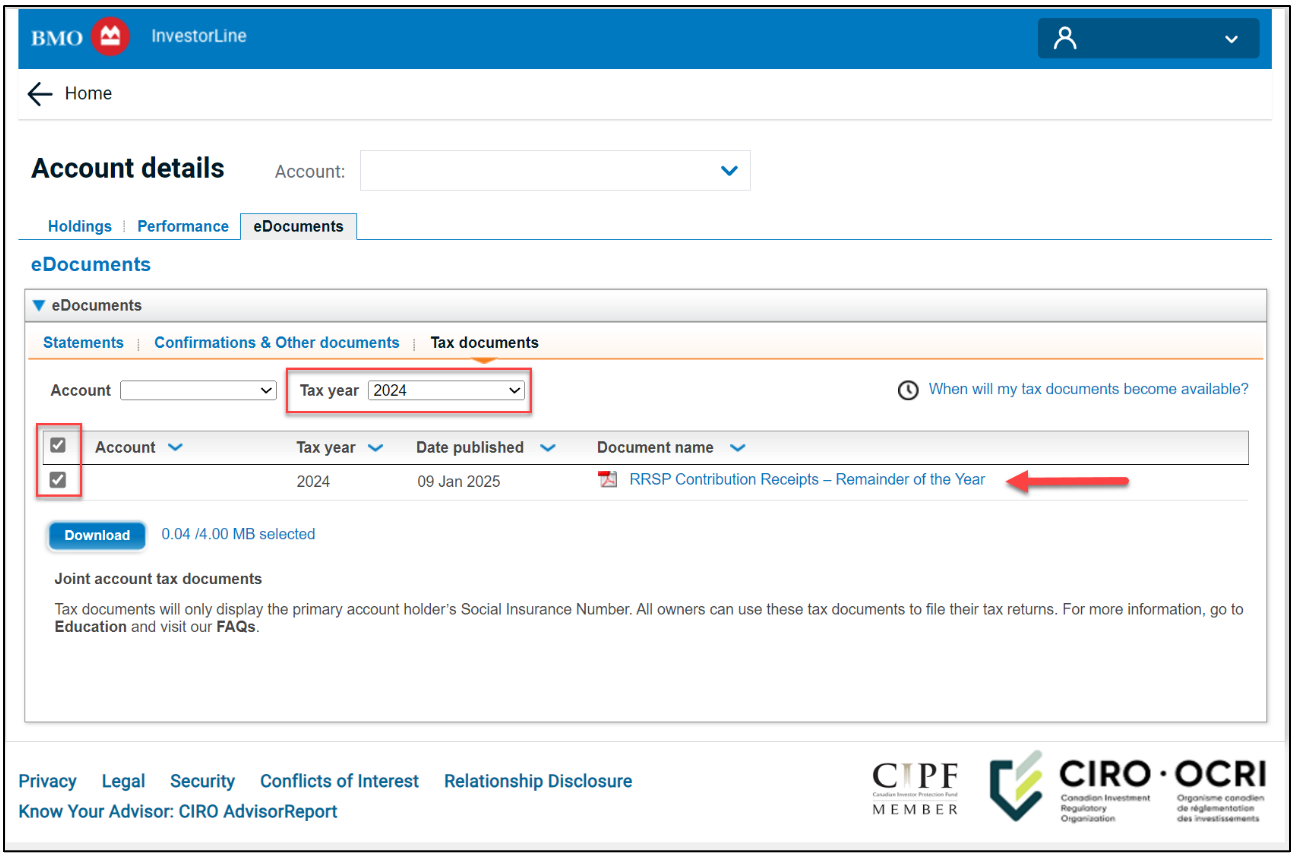
4) Select ‘Tax Documents’



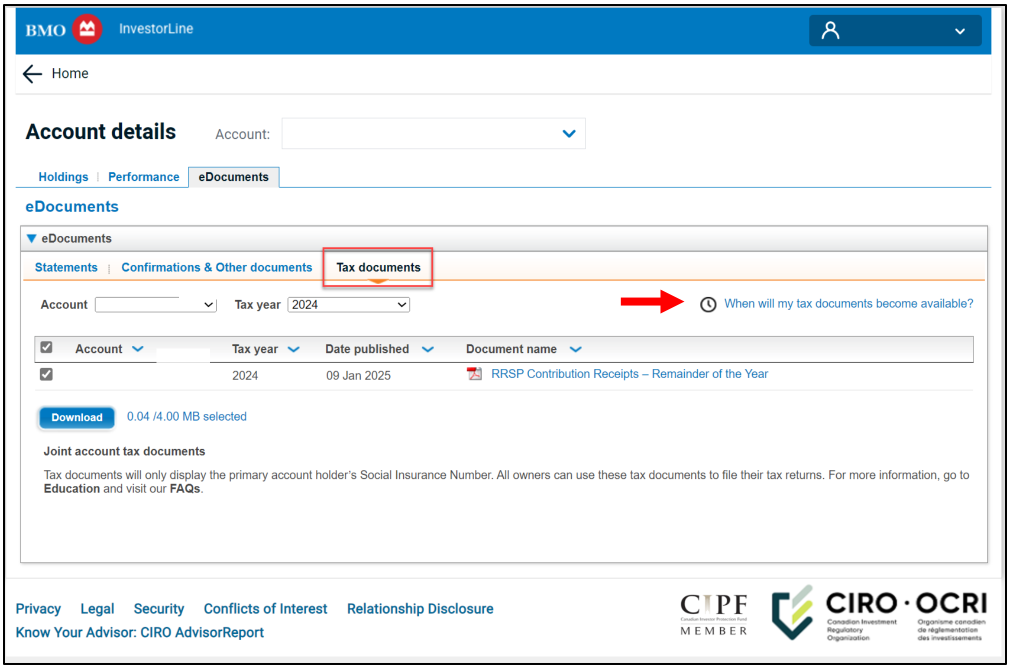
5) All available Tax documents will be visible in table form

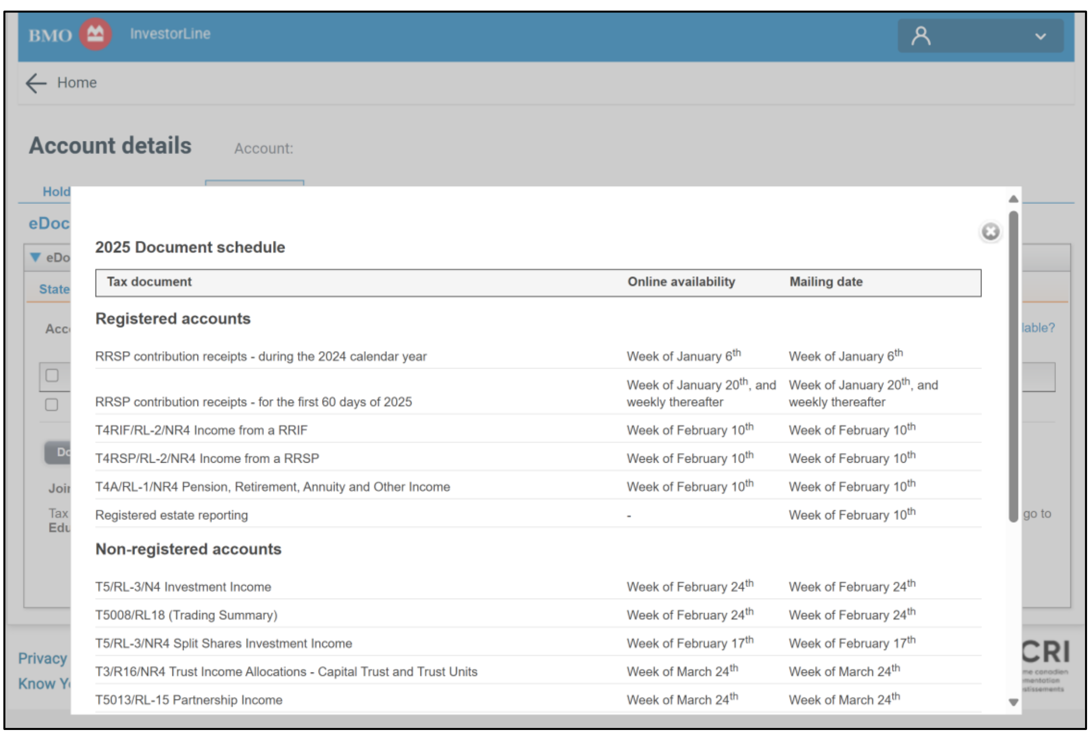
6) To download the desired Tax document, select the year of interest, from the Tax Year dropdown, and then click on the document name

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



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)





2025 Document schedule

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

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
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