

TAX PACKAGE MAILING DATES

For the 2023 tax year-end process, the mailing dates for tax packages are outlined below.

Note: Clients with e-tax preference will have access to their tax forms 2 to 4 business days prior to mailing dates.

Non-Registered Accounts

T5/RL-03/NR4 Package	Approximately February 15, 2024
T5 Additional Package (Split corps)	Between Feb. 26 and Feb. 29, 2024
T3/RL-16 & NR4 Package (Income Trusts)	From March 8, 2024 - Completion
Global Asset Management Mutual fund slips (T5/TL-3/T3/RL-16/NR4)	Between February 26 - February 29, 2024
T5013RL-15 (Limited Partnership Units)	From March 8, 2024 - Completion
1099 Packages (for QI/U.S. persons)*	Approximately March 1, 2024
1042-S Slips/Package*	Approximately March 31, 2024
T5008/RL-18 Consolidated slip (Issued to Quebec residents only)	Between February 26 - February 29, 2024

Registered Accounts

T4RSP/RL-2 Forms	February 14, 2024
T4RIF/RL-2 Forms	February 14, 2024
T4A/RL-1 Forms	February 14, 2024
NR4 Forms	February 14, 2024
T4FHSA/RL-32 Forms	Last week of February

Contribution Receipts

Remainder of 2023	Mid January
January 2, 2024 to January 5, 2024	Mid January
January 8, 2024 onwards	2-5 business days based on volumes
RIF Evaluation Letters	Approximately January 31, 2024

**Documents/Tax slips not available for eDelivery*