

4. Mailing Deadlines for Various Tax Slips

Below is a table of the various government tax slips and summaries you may potentially need to prepare your income tax return. Please note that these documents reflect the transactions and income recorded during the calendar year and some slips may not apply to your situation. Before completing your tax return, we ask you to ensure you have received all your slips. This will avoid having to file an amended tax return. Note that the various summaries can be used as tools in verifying your tax slips.

Non-Registered		
Type of Income/Fees	Slip and Summary	Mailing Deadline ¹
Dividends, interest, foreign income	T5 and summary	February 29, 2024
All investment income, interest and fees paid	<i>Investment Income Summary</i> ³	February 29, 2024
Realized gains and losses	T5008 and <i>Securities Transactions Summary</i> ³	February 29, 2024
Income from strip coupons	<i>Accumulated Interest Report</i>	February 29, 2024
Trust income ²	T3 and <i>Summary of Trust Income</i> ³	March 31, 2024
Limited partnerships	T5013	March 31, 2024
Registered Investments		
Withdrawal from a registered investment account:		
RRSP	T4RSP	February 29, 2024
RRIF/LRIF/ LIF	T4RIF	February 29, 2024
RESP/RDSP	T4A	February 29, 2024
FHSA ⁴	T4FHSA	February 29, 2024

- 1 - Government-prescribed date.
- 2 - The first time T3 slips are issued, a "Summary of Upcoming Trust Units" may be sent to you. This summary will list trusts for which the issuers have not yet provided the tax information necessary for the filing of tax slips, and for which a tax slip will be sent later.
- 3 - This summary is not government-prescribed, but NBFWM commits to issuing it at the specified date, if needed.
- 4 - T4FHSA also includes RRSP contributions and transfers.

RRSP Contributions		
Time of Contribution	Contribution Deadline	Time of Reception
First 60 days of 2022	March 1, 2022	You should have received your contribution slip in March 2022.
Rest of the year 2022	N/A	You should have received your contribution slip in January 2023.
First 60 days of 2023	March 1, 2023	You should receive your contribution slip in March 2023.