

Statement and tax slip mailing dates

DESJARDINS WEALTH MANAGEMENT



| REGISTERED ACCOUNTS | | |
|----------------------------|---|---|
| Slip | Type of slip | Sent by |
| RRSP contribution receipts | Contributions made between March 1 and December 31, 2024 | Mid-January 2025 |
| | Contributions made between January 1 and March 3, 2025 | Each week starting the third week of January 2025 |
| NR4 | Withdrawal by a non-resident | March 31, 2025 |
| T4RSP/RL-2* | Withdrawal from an RRSP or LIRA | February 28, 2025 |
| T4RIF/RL-2* | Withdrawal from a RRIF or LIF | |
| T4A/RL-1* | Taxable withdrawals from a RESP or TFSA (income after death) | |
| T4A/RL-2* | Annuity from an individual pension plan (IPP) | |
| T4FHSA | Contributions to an FHSA made between January 1 and December 31, 2024 | |
| | Qualifying withdrawals and transfers from an FHSA | |
| T4FHSA/RL-32* | Non-qualifying withdrawals from an FHSA | |

NON-REGISTERED ACCOUNTS

| Slip | Type of slip | Sent by |
|--------------------------------------|--|--|
| T5/RL-3* | Dividend or interest income totalling \$50 or more | February 28, 2025 |
| T5/RL-3* Split corp | Split corp income totalling \$50 or more | |
| T5008/RL-18* | Securities transactions statement | |
| T3 (trust units)/RL-16* | Income from trust units | March 31, 2025** |
| T3 (mutual funds)/RL-16* | Income distributions and returns of capital for mutual funds | Sent by fund company by March 31, 2025** |
| T5013/RL-15* | Partnership income (Make sure you have received the statement before filing your tax return if, for example, you have a Brookfield LPU-type investment.) | March 31, 2025 |
| NR4 | Distributions to non-residents: • Investment income totalling \$50 or more • Company income • Split corp income | March 31, 2025 |
| 1099-INT 1099-DIV | Interest or dividend income received by a US citizen or resident | January 31, 2025 |
| 1099-B | Proceeds of a sale for US residents only | February 17, 2025 |
| 1042-S | Interest or dividend income from a US source paid to a non-US resident in a RESP | March 17, 2025 |

* RL-1, RL-2, RL-3, RL-15, RL-16, RL-18 and RL-32 slips are only produced for Quebec residents.

** For mutual fund trusts with a tax year ending December 15, 2024, the deadline is March 17, 2025.

Note: Since we need to wait for information from issuers, some statements may not be sent out until early April.

