

BMO Mutual Funds - 2024 advisor tax forms

Tax form availability on Webplus and Canada Post mailing schedule

Registered Accounts

Tax form	Expected on-line	Expected mailing date ¹
RRSP Receipts		
For contributions made during the last 10 months of 2024	Jan 20 2025	Jan 25 2025
For contributions made in Jan 2025	Feb 7 2025	Feb 14 2025
For contributions made from Feb 1, 2025 to Mar 3, 2025	Mar 18 2025	Mar 24 2025
Tax Slips		
T4RIF / Releve_2 slips	Feb 3 2025	Feb 7 2025
T4RSP / Releve_2 slips	Feb 3 2025	Feb 7 2025
T4A / Releve_1 slips	Feb 3 2025	Feb 7 2025
NR4 (RRIF, RRSP, RESP, RDSP)	Feb 3 2025	Feb 7 2025

Non-registered Accounts

Tax form	Expected on-line availability	Expected mailing date ¹
Tax Slips		
T3 / Releve_16 slips	Mar 26 2025 ²	Apr 2 2025 ²
T5008 / Releve_18 slips	Mar 26 2025 ²	Apr 2 2025 ²
NR4 (Non-Registered)	Mar 26 2025 ²	Apr 2 2025 ²

2024 RRSP Contribution Deadline – March 3, 2025

¹ Please allow three to seven business days for delivery by Canada Post after expected mailing date before contacting our service center.

² The T3 dates have been updated due to last minute changes made by the CRA to the capital gains inclusion rates.

Commissions, trailing commissions (if applicable), management fees and expenses all may be associated with mutual fund investments. Please read the fund facts or simplified prospectus of the relevant mutual fund before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. Distributions are not guaranteed and are subject to change and/or elimination. For a summary of the risks of an investment in BMO Mutual Funds, please see the specific risks set out in the simplified prospectus. BMO Mutual Funds are managed by BMO Investments Inc., which is an investment fund manager and a separate legal entity from Bank of Montreal. BMO Global Asset Management is a brand name under which BMO Asset Management Inc. and BMO Investments Inc. operate. "BMO (M-bar roundel symbol)" is a registered trademark of Bank of Montreal, used under licence.