



## Getting your tax slips

The 2019 tax filing season is just a few months away. To help you start preparing, we've put together a schedule of when you can expect to receive the most common tax slips in the mail. Depending on the holdings in your account(s) and transactions, you will receive some or all the tax documents outlined below.

As a reminder:

- **March 2, 2020:** Last date for 2019 Registered Retirement Savings Plan (RRSP)<sup>1</sup> contributions.
- **April 30, 2020:** Last date to file income tax returns for individuals and most business owners<sup>2</sup>.
- **June 15:** Last date to file your tax return if you are self-employed. If you owe a balance for 2019, pay it on or before **April 30, 2020**<sup>2</sup>.

Registered Accounts		
Document	Overview	Expected distribution date
RRSP Contribution Receipts	All RRSP Contributions	Week of January 6, 2020 for contributions made between March 2 and December 31, 2019. Weekly starting January 6, 2020 for contributions made in the first 60 days of 2020.
NR4 Retirement Savings Plan (RSP)	Non-resident withdrawals from RSP	March 31, 2020
NR4 Retirement Income Fund (RIF) <sup>3</sup>	Non-resident withdrawals from RIF	March 31, 2020
T4RSP	Withdrawals from RSP	March 2, 2020
T4RIF	Withdrawals from RIF	March 2, 2020
Relevé 2	Quebec residents — submitted with T4RSP/T4RIF	March 2, 2020
T4A/Relevé 1	Registered Education Savings Plan (RESP) withdrawals	March 2, 2020
T4A/Relevé 1	Registered Disability Savings Plan (RDSP) withdrawals	March 2, 2020
Non-registered Accounts		
Document	Overview	Expected distribution date
T5/R3 (Mutual Funds)	Income Distribution from Corporate Class Mutual Funds and High Interest Saving Account	March 2, 2020 from the fund company
T3/RL-16 (Mutual Funds)	Income Distribution and Return of Capital from Mutual Fund Trusts	March 30, 2020 from the fund company
T5/R3	Dividend and interest income equal to or greater than \$50	March 2, 2020
T5/R3	All Split Corporation income	March 2, 2020
T5008/RL-18	All dispositions (sales, redemptions and maturities) for the tax reporting year	March 2, 2020
T3/RL-16	Trust unit income	March 30, 2020
T5013/RL-15	Partnership income	March 30, 2020
NR4	Distributions to non-residents	March 31, 2020
1042S	US Source Income* Reporting for Simple Trust, Grantor Trust, and Partnership reporting	March 16, 2020
1099INT	U.S. person receiving interest income	January 31, 2020

Non-registered Accounts		
Document	Overview	Expected distribution date
1099DIV	U.S. person receiving dividend income	January 31, 2020
1099B Substitute	U.S. person receiving proceeds from sale	February 17, 2020
Other non-government reports	Investment Income Summary if receiving a T5	March 2, 2020
	Trading Summary	March 2, 2020
	Summary of Trust Income, excluding Mutual Funds	March 30, 2020
	Pending Trust Unit Summary	March 30, 2020

- Visit [www.td.com/tax2019](http://www.td.com/tax2019) for answers to frequently asked questions and more.
- If you have questions about the delivery of your tax slip(s), please speak with your Portfolio Manager. For specific tax advice, consult your tax advisor.

## TD Wealth



\*For Internal Revenue Service reporting, if you are charged the maximum U.S. withholding tax rate of 30% and live in a country with which the United States has a treaty, you may be able to reduce your withholding tax payable by providing TD Wealth Private Investment Counsel with the required documentation. Contact your Portfolio Manager for more information.

<sup>1</sup> Retirement Savings Plan (RSP) – Refers to the TD Waterhouse Private Investment Counsel Inc. Retirement Savings Plan. <sup>2</sup> If you owe tax for 2019 and do not file your return for 2019 on time, CRA may charge you a late-filing penalty. The penalty is 5% of your 2019 balance owing plus 1% of your balance owing for each full month that your return is late, to a maximum of 12 months. <sup>3</sup> Retirement Income Fund (RIF) – Refers to the TD Waterhouse Private Investment Counsel Inc. Retirement Income Fund.

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