

As an investor, you could potentially receive a variety of income tax slips that you will need in order to prepare your annual income tax return.

To help simplify your tax-preparation efforts, the attached article – [Tax Slip Overview and Schedule](#) – provides an overview of the tax slips and supporting documents you may receive from BMO Nesbitt Burns and their expected mailing dates. It's important that you receive all required tax slips before preparing your tax return to prevent having to file a T1-ADJ form to amend your tax return. Of special note, many of our portfolios utilize Exchange Traded Funds (ETFs). ETFs have until March 31, 2017 to issue their T3s. Given this, you may consider filing after this date to ensure you have received all the appropriate T3s.

Please contact our office if you have any questions or would like to discuss your portfolio.

Sincerely,

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The comments included in this publication are not intended to be a definitive analysis of tax applicability or trust and estates law. The comments contained herein are general in nature and professional advice regarding an individual's particular tax position should be obtained in respect of any person's specific circumstances.

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