
Income Tax Documents

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Tax time is closing in on us and we know many of you will be looking for T-slips and RRSP Contribution Receipts. We'll be available if you need help tracking down any of these slips or need clarification on the Tax Implications of any transactions that you made in 2023. Many of these Tax Slips and/or RRSP Contribution Receipts will come in the mail. More recently though, a lot of companies have been sending these kinds of things electronically. If you have signed up for electronic documents with an Investment Company, you will be getting some emails about downloading statements. If you have a B2B Bank Investment Loan, please don't forget to use your Interest Statement when submitting your Tax Return. Interest Rates have gone up a lot since 2022 and you will want to use this Interest to reduce your Taxable Income!

Please also keep in mind that if you hold a Portfolio Strategies Nominee RRSP, you will likely be getting your RRSP Contribution Receipts electronically. **If you are signed up with E-delivery, you will be able to login to the Portfolio Strategies Client Portal and download your RRSP Contribution Receipt. This receipt is available in a section called "MyPortfolio"**. For clients who have elected for non-electronic document delivery, receipts will be mailed out. Natalie and I will be able to help you with this process and can locate your Portfolio Strategies Statements and Tax Documents. Feel free to reach out to us if you have any trouble at all.

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We'll remind you that companies don't have to send Tax Slips out to you all that early in the year. Some of your

slips won't come until later in March and some may not arrive until early April. The deadline to submit personal Income Tax is April 30th. Companies can't always issue tax documents earlier in the year, so we ask you to be patient here. Please keep this in mind if you bought into a Flow-Through Share Limited Partnership in 2023. Tax slips for Flow-Through LPs can be very slow to come. As always, we are happy to help you track down anything that you haven't gotten closer to that April 30th deadline.

Wishing you all the best during the 2023 Tax Season!

Bryce A. Borden

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