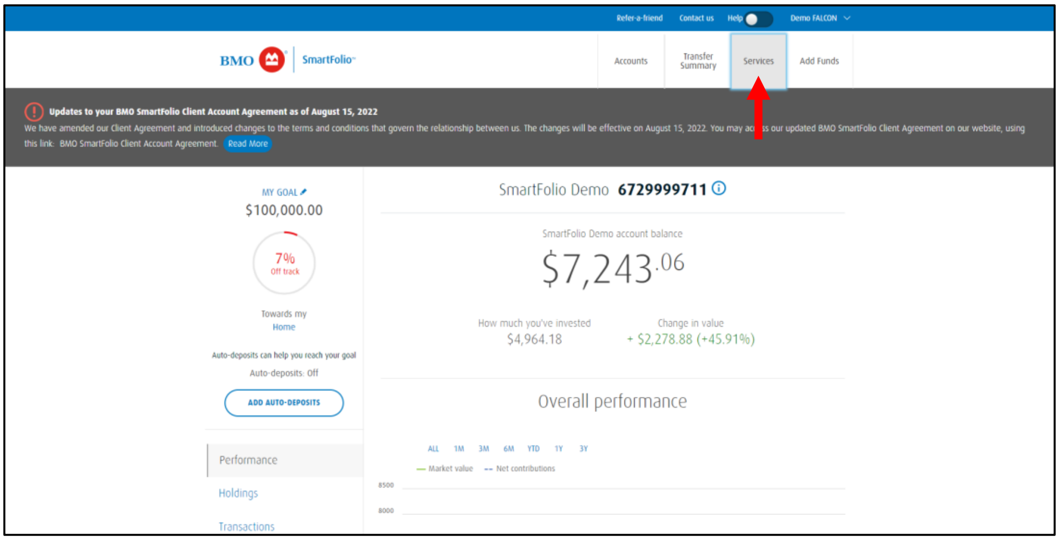
BMO Wealth Management

BMO SmartFolio

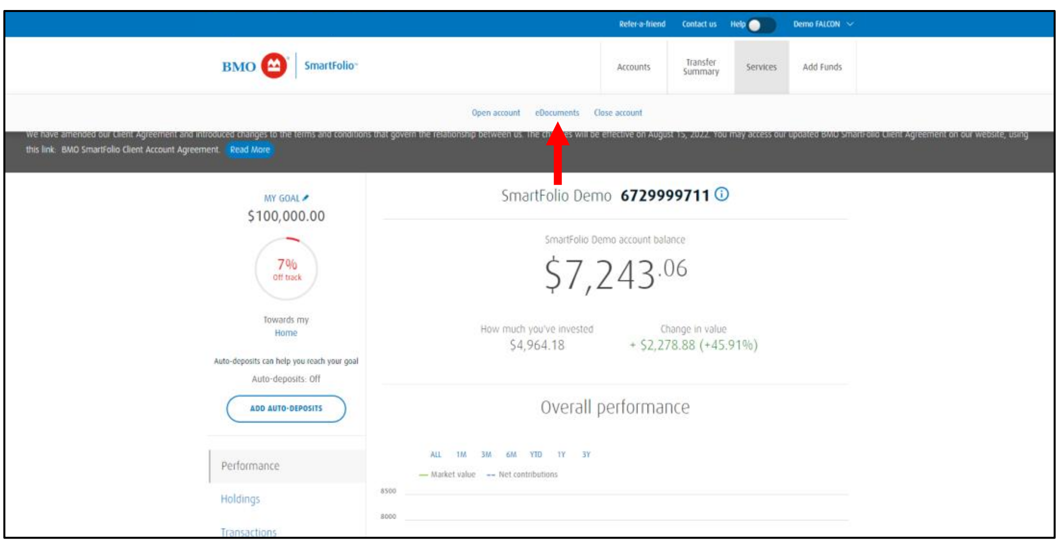
Accessing Tax Documents

1) Log in to your SmartFolio account

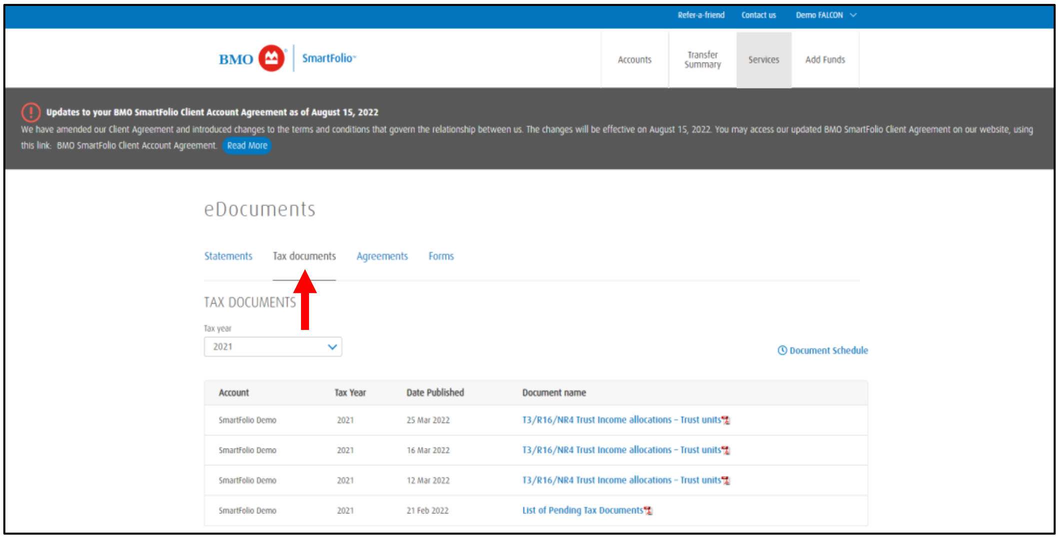
2) Select ‘Services’ (a dropdown will appear)



3) Select ‘eDocuments’



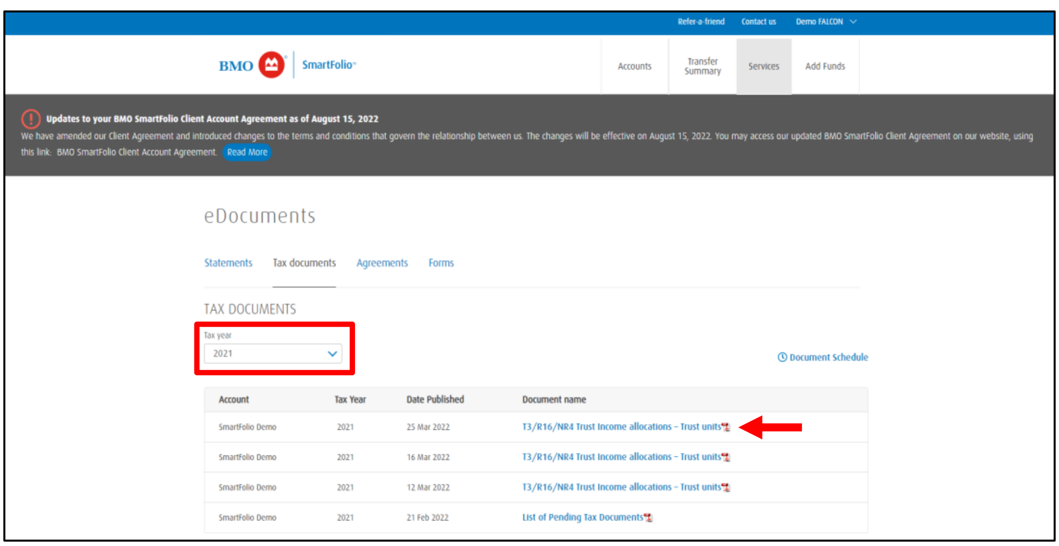
4) Select ‘Tax documents’



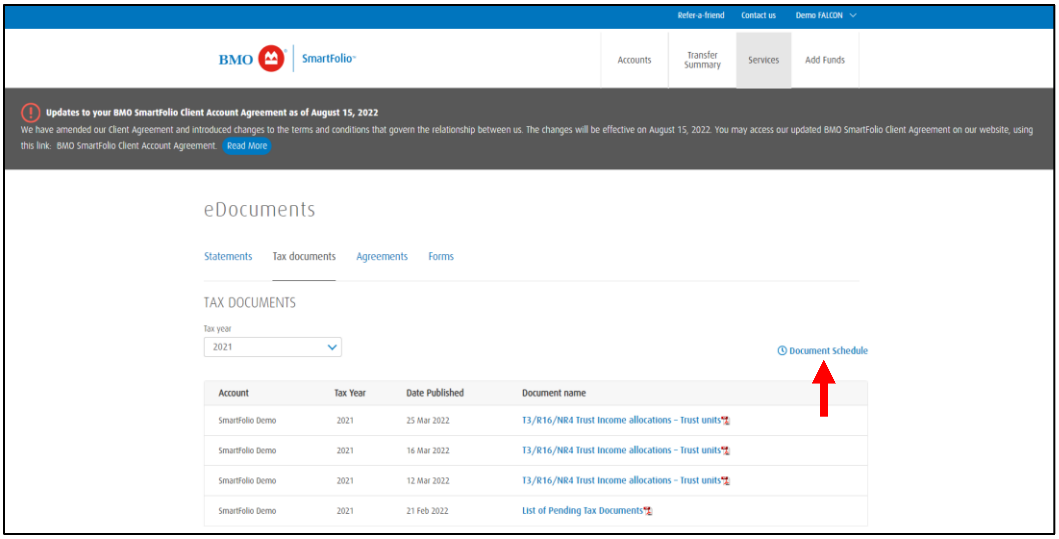
5) All available Tax documents will be visible in table form

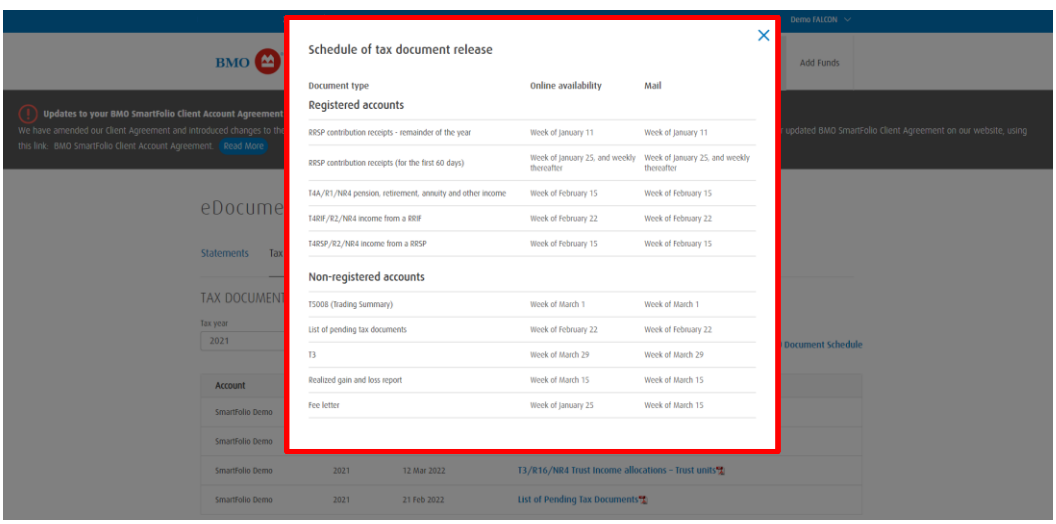
6) Select the desired Tax Year from the drop down

7) To download the desired Tax document, click on the document name



8) If you do not see the desired tax document or believe it is missing, select ‘Document Schedule’ to confirm the availability schedule (a separate pop-up will appear on the screen)





Note:

(1) Tax documents are only accessible via desktop browser currently.

Let's connect

We're available Monday to Friday
between 8 a.m. and 6 p.m. (ET)
to answer your questions.

Call us
1-888-895-3721

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