

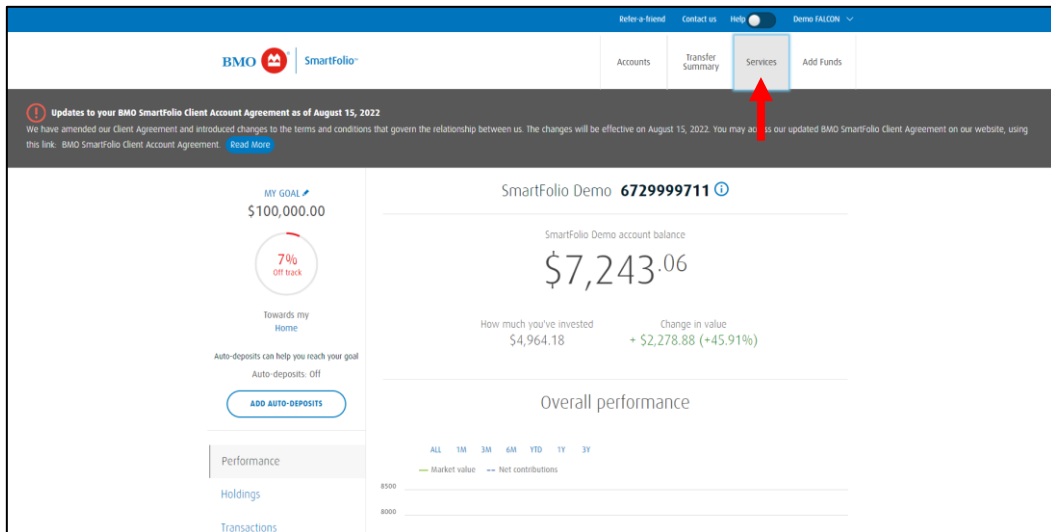


**BMO Wealth
Management**
BMO SmartFolio

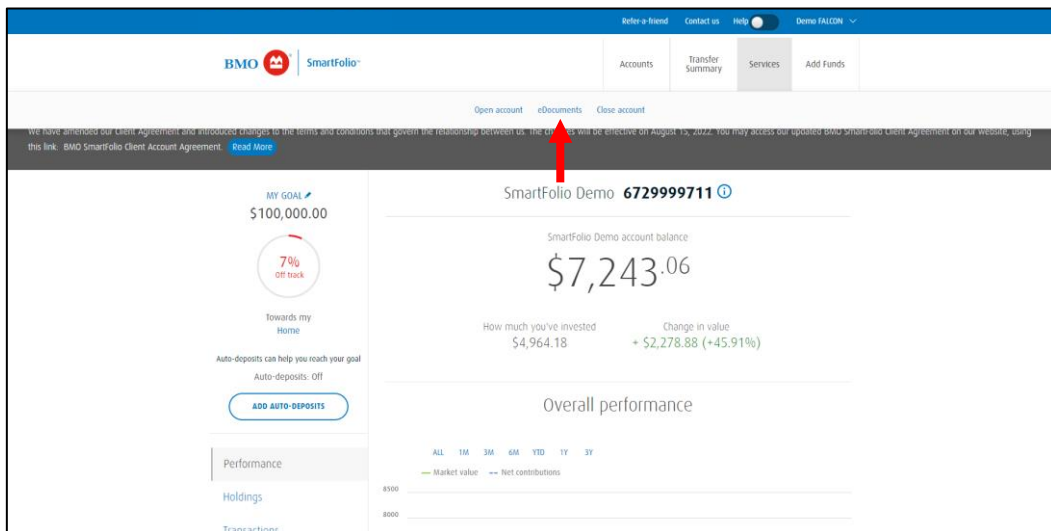
Accessing Tax Documents



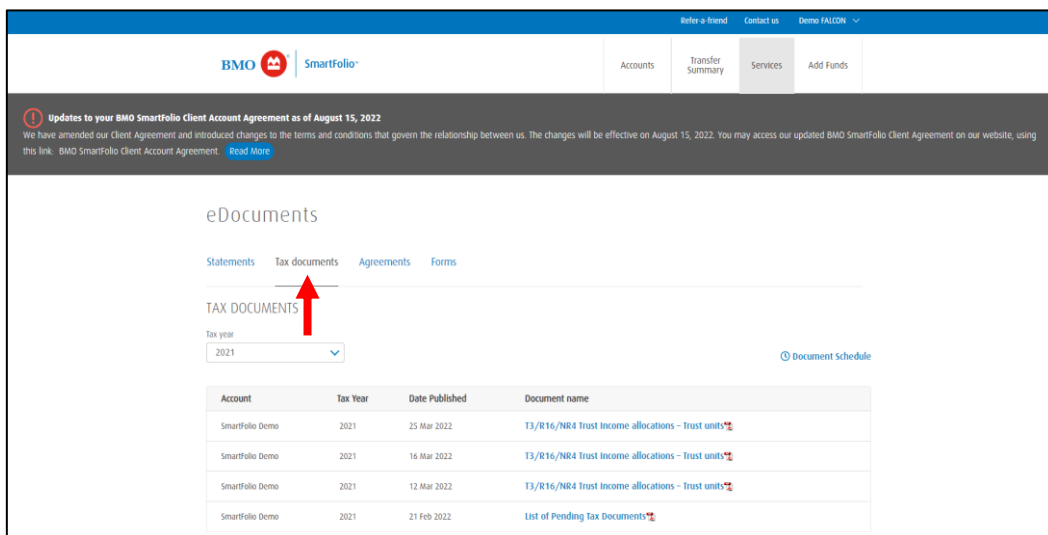
- 1) Log in to your SmartFolio account
- 2) Select 'Services' (a dropdown will appear)



- 3) Select 'eDocuments'



4) Select 'Tax documents'



Updates to your BMO SmartFolio Client Account Agreement as of August 15, 2022
We have amended our Client Agreement and introduced changes to the terms and conditions that govern the relationship between us. The changes will be effective on August 15, 2022. You may access our updated BMO SmartFolio Client Agreement on our website, using this link: [BMO SmartFolio Client Account Agreement](#) [Read More](#)

eDocuments

Statements Tax documents Agreements Forms

TAX DOCUMENTS

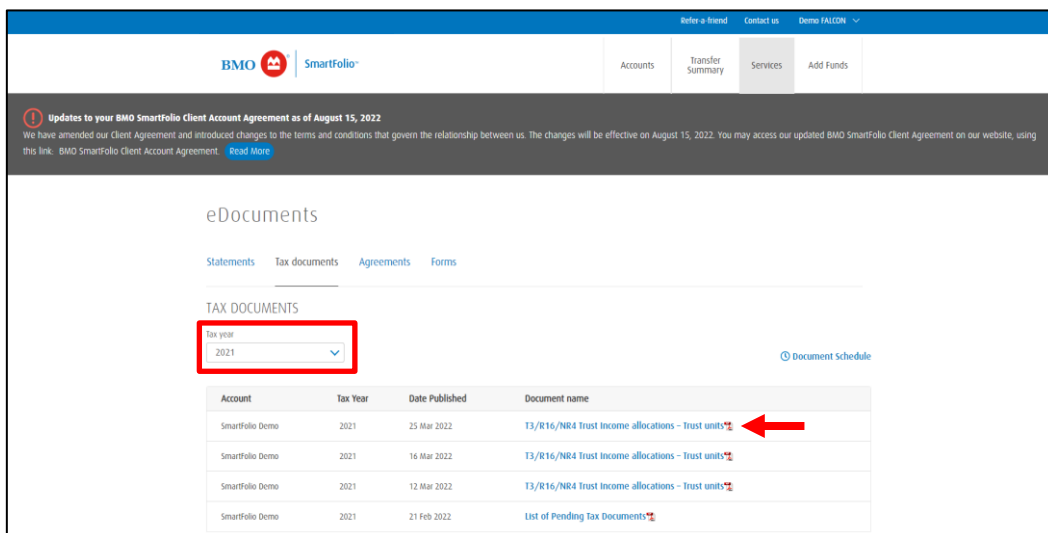
Tax year: 2021 [Document Schedule](#)

Account	Tax Year	Date Published	Document name
SmartFolio Demo	2021	25 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	16 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	12 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	21 Feb 2022	List of Pending 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



Updates to your BMO SmartFolio Client Account Agreement as of August 15, 2022
We have amended our Client Agreement and introduced changes to the terms and conditions that govern the relationship between us. The changes will be effective on August 15, 2022. You may access our updated BMO SmartFolio Client Agreement on our website, using this link: [BMO SmartFolio Client Account Agreement](#) [Read More](#)

eDocuments

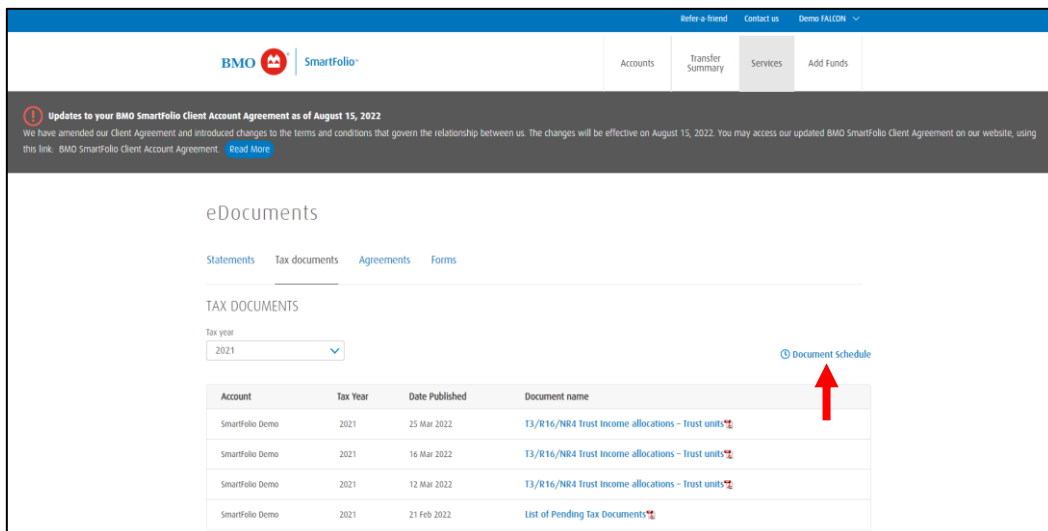
Statements Tax documents Agreements Forms

TAX DOCUMENTS

Tax year: 2021 [Document Schedule](#)

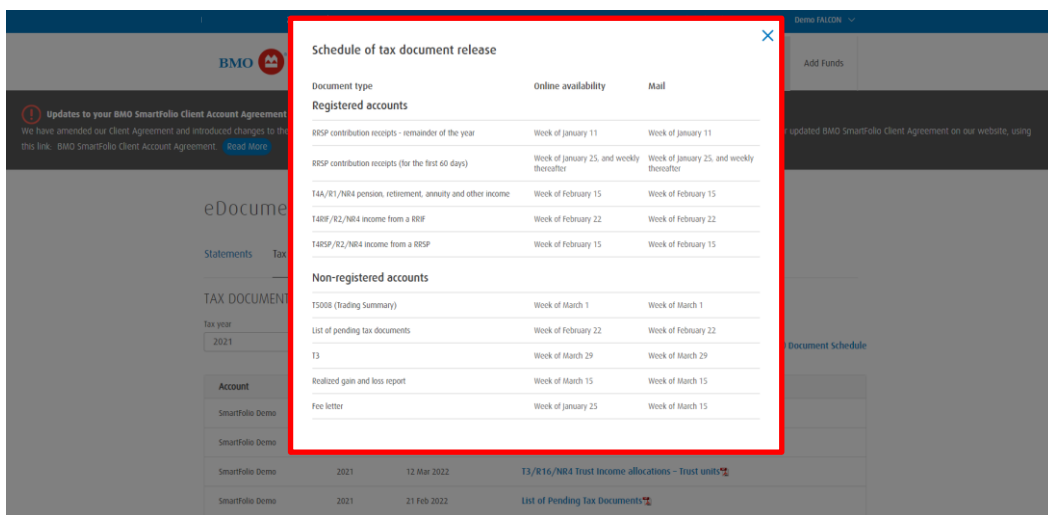
Account	Tax Year	Date Published	Document name
SmartFolio Demo	2021	25 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	16 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	12 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	21 Feb 2022	List of Pending Tax Documents

- 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)



The screenshot shows the BMO SmartFolio eDocuments interface. At the top, there's a navigation bar with 'Accounts', 'Transfer Summary', 'Services', and 'Add Funds'. Below this, a banner mentions updates to the BMO SmartFolio Client Account Agreement as of August 15, 2022. The main section is titled 'eDocuments' and includes tabs for 'Statements', 'Tax documents', 'Agreements', and 'Forms'. Under 'TAX DOCUMENTS', there's a 'Tax year' dropdown set to '2021'. A table lists tax documents with columns: Account, Tax Year, Date Published, and Document name. A red arrow points to a 'Document Schedule' link in the top right corner of the table area.

Account	Tax Year	Date Published	Document name
SmartFolio Demo	2021	25 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	16 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	12 Mar 2022	T3/R16/NR4 Trust Income allocations - Trust units
SmartFolio Demo	2021	21 Feb 2022	List of Pending Tax Documents



The screenshot shows a pop-up window titled 'Schedule of tax document release'. It contains a table with columns: Document type, Online availability, and Mail. The table is divided into 'Registered accounts' and 'Non-registered accounts'.

Document type	Online availability	Mail
Registered accounts		
RSP contribution receipts - remainder of the year	Week of January 11	Week of January 11
RSP contribution receipts (for the first 60 days)	Week of January 25, and weekly thereafter	Week of January 25, and weekly thereafter
T4A/R1/NR4 pension, retirement, annuity and other income	Week of February 15	Week of February 15
T4RIF/R2/NR4 income from a RRRIF	Week of February 22	Week of February 22
T4RSP/R2/NR4 income from a RSP	Week of February 15	Week of February 15
Non-registered accounts		
T5008 (Trading Summary)	Week of March 1	Week of March 1
List of pending tax documents	Week of February 22	Week of February 22
T3	Week of March 29	Week of March 29
Realized gain and loss report	Week of March 15	Week of March 15
Fee letter	Week of January 25	Week of March 15

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



Learn More
bmo.com/online-investing



BMO Wealth Management is a business group that consists of Bank of Montreal and certain of its affiliates including BMO InvestorLine Inc. and BMO Nesbitt Burns Inc., in providing wealth management products and services. Not all products and services are offered by all legal entities within Wealth Management.

"BMO (M-design)", "BMO" and "BMO (M-design) Wealth Management" are registered trademarks of Bank of Montreal, used under license. "Nesbitt Burns" and "SmartFolio" are trademarks of BMO Nesbitt Burns Inc. BMO Nesbitt Burns Inc. and BMO InvestorLine are wholly owned subsidiaries of Bank of Montreal and are Members – Canadian Investor Protection Fund and Members of the Investment Industry Regulatory Organization of Canada.