

TD Direct Investing

Helping You Prepare for the 2017 Tax Season

Filing deadline: April 30, 2018

Visit our [Tax Centre](#)

If you have questions about your tax slip(s) for your account(s), please call 1-800-465-5463 to speak to an Investment Representative.

Tax slip distribution dates

REGISTERED ACCOUNTS		
Form / tax slip	Purpose of Form	eServices Posting and Mailing Date
RSP Contribution Receipts	All RSP Contributions	Week of January 8, 2018 for any contributions made between March 2, 2017 and December 31, 2017. Weekly starting January 8, 2018 for contributions made in the first 60 days of 2018.
NR4 (RSP)	Non-resident withdrawals from RSP	April 2, 2018
NR4 (RIF)	Non-resident withdrawals from RIF	April 2, 2018
T4RSP	Withdrawals from RSP	February 28, 2018
T4RIF	Withdrawals from RIF	February 28, 2018
Relevé 2	Quebec residents - submitted with T4RSP/T4RIF	February 28, 2018
T4A/Relevé 1	RESP withdrawals	February 28, 2018
T4A/Relevé 1	RDSP withdrawals	February 28, 2018

NON-REGISTERED ACCOUNTS

Form / tax slip	Purpose of Form	eServices Posting and Mailing Date
T5/R3 (Mutual Funds)	Income Distribution from Corporate Class Mutual Funds and High Interest Saving Account	February 28, 2018 from the fund company
T3/RL-16 (Mutual Funds)	Income Distribution and Return of Capital from Mutual Funds	April 2, 2018 from the fund company
T5/R3	Dividend and interest income equal to or greater than \$50	February 28, 2018
T5/R3	All Split Corporation income	February 28, 2018
T5008/R18	All dispositions (sales, redemptions and maturities) for the tax reporting year.	eServices Posting: February 10, 2018 Mailing : February 28, 2018
T3/RL-16	Trust unit income	April 2, 2018
T5013/RL-15	Partnership income	April 2, 2018
NR4	Distributions to non-residents	April 2, 2018
1042S	US Source Income* Reporting for Simple Trust, Grantor Trust, and Partnership reporting	March 15, 2018
1099INT	U.S. person receiving interest income	January 31, 2018
1099DIV	U.S. person receiving dividend income	January 31, 2018
1099B Substitute	U.S. person receiving proceeds from sale	February 15, 2018
Other non-government reports	Investment Income Summary if receiving a T5	Included in the T5 Package
	Trading Summary	Included in the T5 Package
	Summary of Trust Income, excluding Mutual Funds	Included in the T3 Package
	Pending Trust Unit Summary	Included in the T3 Package

eServices

Clients registered for eServices can view and retrieve their tax receipts online in WebBroker. You can also import your history for non-registered accounts to a variety of popular money management software programs online by downloading in either CSV (comma separated value) or PDF (portable document) formats. To register for WebBroker and/or eServices, call the WebBroker Help Desk at 1-800-667-6299. Online access to tax receipts through eServices on WebBroker replaces your mailed receipts allowing you to receive your tax information sooner, without any postal delays, and enabling you to print them at your convenience.

* For Internal Revenue Service reporting, if you are being charged the maximum tax rate of 30% and live in a treaty country you may be able to reduce your tax paid by providing TD Waterhouse Canada Inc. with the required documentation. Contact your Investment Representative for more information.

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