# 2020 TAX RECEIPT SCHEDULE

## Online Tax Receipts

Raymond James Ltd. is pleased to offer you an electronic delivery option for your 2020 tax receipts. You can elect to receive your electronic receipts on-line on our client website at https://client.raymondjames.ca/. This secure "paperless" option replaces the traditional paper mailing of all your receipts and our online system will automatically notify you via email as each receipt is posted. To join our paperless campaign, please visit our website or speak to your Raymond James Ltd. Advisor.

If you have chosen the mailing route, here is some pertinent information regarding the estimated tax receipt mailing dates to help you organize for the upcoming tax season.

## Table Of Dates

| Federal & US Forms | Expected Mailing Date |
|---|---|
| 1099-B, 1099-DIV, 1099-INT, 1099-MISC – IRS Reporting(US Persons) | February 15, 2021 |
| T4A – RESP Income | February 28, 2021 |
| T4RSP & T4RIF – RRSP and RRIF Income | February 28, 2021 |
| T5008 – Return of Securities Transactions & Trading Summary | February 28, 2021 |
| T5 & Summary of Investment Income – Dividend and Interest Income | February 28, 2021 |
| Foreign Asset Verification Report | February 28, 2021 |
| T3 – Canadian Trust Income | March 31, 2021 |
| T5013 – Canadian Limited Partnership Income | March 31, 2021 |
| NR4 – Canadian Income Paid to Non-Residents | March 31, 2021 |
| NR4 – RRSP and RRIF Income Paid to Non-Residents | March 31, 2021 |

| Quebec Forms | Expected Mailing Date |
|---|---|
| Relevé 1 – RESP Income paid to Quebec Residents | February 28, 2021 |
| Relevé 2 – RRSP and RRIF Income paid to Quebec Residents | February 28, 2021 |
| Relevé 3 – Dividend and Interest Income | February 28, 2021 |
| Relevé 15 – Canadian/Quebec Limited Partnership Income | March 31, 2021 |
| Relevé 16 – Canadian Trust Income | March 31, 2021 |

**Points to remember:**

- All tax receipts issued by Raymond James Ltd. will be issued to the primary address and SIN/Tax Identification number on file with us.
- All T5 and T3 tax receipts for Mutual Fund investment income are issued directly by the fund companies (not by Raymond James Ltd.).

### 2020 RRSP contribution receipts

The RRSP contribution deadline for the 2020 taxation year is Monday, March 1, 2021. RRSP contribution receipts for the remainder of 2020 (encompassing all contributions made between March 3, 2020 and December 31, 2020) will be mailed by the end of January. All RRSP contribution receipts for the first 60 days of 2021 (encompassing all contributions made January 1, 2021 to March 1, 2021) will be consolidated and mailed together by the 3rd week of March. Please note that electronic copies of the RRSP contribution receipts will be available on our website for viewing and retrieval by the end of January 2021, with new receipts being posted on a weekly basis as they become available for contributions made in the first 60 days of 2021.