



It's Tax Time!

Important RRSP & Tax Information

The RRSP contribution deadline is

Monday, March 2, 2020

- Transferring money via online banking **no later than Friday, February 21, 2020**. If done later, we may request proof of submission date for backdating.
- To move money from your existing accounts into your RRSP, please contact our office **no later than: Friday, February 21, 2020** (To allow our office time to process this on your behalf.)
- Please make cheques payable to: **HollisWealth**
- Once we receive your deposit we will be in touch with you to confirm receipt.

Tax Slip Mailing Dates

JAN. 2020 - RRSP Contribution receipts for March to December 2019 contributions (sent from head office in Toronto). All contributions made in the first 60 days of 2020 will be mailed out bi-weekly

MAR 2, 2020 - T5, T5008, T4RSP/T4RIF/T4A tax slips will be mailed (from head office in Toronto)

Mar. 31, 2020- T5013/T5013A, T3 slips will be mailed

*Please note: certain group RRSP receipts will be mailed after March 31, 2020

All tax slips will be available to you online via your **MyPortfolio+ online system after their respective issue dates.

Online Contributions

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How to make your ON-LINE RRSP contribution:

1. Log into your on-line banking account as if you were making an on-line bill payment
2. Go to Add Payee or Add Bill
3. Search HollisWealth
4. Select HollisWealth iAS

*do NOT select HollisWealth Advisory Services as this is a separate division of our company

5. Add your RRSP account number with no dashes
6. Enter the dollar amount
7. Email Katy Chudskov – k.chudskov@holliswealth.com

(so we can watch for the deposit)

If you are having any issues, please contact your Administrative Assistant

306.975.9500

Important Reminders:

Your Guide to 2019 Tax Reporting will be included in the T5 tax packages mailed beginning of February 2020, and will assist you with understanding the tax forms you may receive from HollisWealth.

**Please note that this report will now include 2019 realized gain/loss information and both market & book value Foreign Property (T1135) Reports*

Trading Disposition Summary (TDS) will be included in the February tax package to clients

Trading Summary (TS) will be loaded to MyPortfolio+ in February and available to advisors to pull as needed.

Consistent F/X rates applied to data reported on TDS and T5008



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