



## **eDocs:** *Contribution Receipts and Tax Forms*

*Your secure Internet access to Contribution Receipts and Tax Forms (T3, Relevé 16, and NR4, T5, Relevé 3 and NR4)*



### Functionality Overview

- iFAST/Web users navigate to two menu options: Account Level RRSP Contribution Receipts and Tax Forms.
- The Contribution Receipts page displays a list of current and historical tax year receipts. The Tax Forms page display a list of current year tax forms.
- The user generates the PDF by selecting the Contribution Receipt Number or the Tax Form type. The PDF version will look just like the Contribution Receipts/Tax Forms in the mailbox at home, but will be marked as a duplicate.
- Support of client specific customization for Contribution Receipts of logos, trustee, signature and signing authority.
- The Contribution Receipt/Tax Form displays real-time from the iFAST tax tables including relevant footnotes based on the account transactions. The iFAST data is updated based on the client's Contribution Receipt and Tax Slip generation job schedules.

### Key Benefits

- Online Contribution Receipts/Tax Forms is the first offering in a series of green initiatives to bring eDocs to iFAST/Web.
- iFAST/Web users can view or print the Contribution Receipts/Tax Forms they need, when they need it using the printer in their office or at their desk.
- Contribution Receipts/Tax Forms are available online immediately after the iFAST tax scheduled jobs are completed.

- iFAST/Web users can reduce their paper clutter and stay organized with less effort. Users can view, print or save Contribution Receipts/Tax Forms to their own computer.
- Online access to these duplicate PDFs for the advisors and other users of iFAST/Web will provide better client service and reduce calls into call centres.
- Improved Internet offering.

### About Contribution Receipts

Contribution Receipts are generated for any eligible purchases made into a registered savings plan.

### About T3, Relevé 16, and NR4

The T3 reports the total amount of investment income distributed to Canadian resident investors holding mutual fund trust units in non-registered account(s). If you live in the province of Quebec, you also require a Relevé 16 slip. Non-residents holding a non-registered account will receive a NR4.

### About T5, Relevé 3, and NR4

The T5 reports the total amount of investment income distributed to Canadian resident investors holding mutual fund corporation units in non-registered account(s). If you live in the province of Quebec, you also require a Relevé 3 slip. Non-residents holding a non-registered account will receive an NR 4.



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