

Income Tax Information Slips: Important Dates

For taxpayers to file their required income tax returns, certain income tax information slips need to be received. A listing of the common information slips has been included in the table below. The table also contains what income is commonly reported on the slip relating to Wellington-Altus investment accounts, and when you can expect to receive this information.

Information Slip Description	What is Reported?	Online Documents Target Date	Mailing Target Date
T3 Statement of Trust Income Allocations and Designations	Income and gains distributed from a trust (e.g., mutual fund, ETF, etc.)	1 st run – March 16, 2023 2 nd run – March 24, 2023 3 rd run – March 30, 2023	1 st run – March 17, 2023 2 nd run – March 28, 2023 3 rd run – March 31, 2023
T4A Statement of Pension, Retirement, Annuity, and Other Income	Pension payments, RESP EAPs and AIPs, annuities, pension adjustments and other income	January 27, 2023	February 1, 2023
T4RIF Statement of Income from a Registered Retirement Income Fund	Withdrawals from a Registered Retirement Income Fund (RRIF). Also reflects amounts deemed received due to an annuitant's death.	January 27, 2023	February 1, 2023
T4RSP Statement of Registered Retirement Savings Plans Income	Withdrawals from a Registered Retirement Savings Plan (RRSP). Also reflects Home Buyers' Plan (HBP) and Lifelong Learning Plan (LLP) withdrawals, and amounts deemed received due to an annuitant's death.	January 27, 2023	February 1, 2023
NR4 Statement of Amounts Paid or Credited to Non-Residents of Canada	Various sources of income and gains from non-registered, RRSP, or RRIF accounts where the account holder is a non-resident of Canada.	January 27, 2023	February 1, 2023
T5 Statement of Investment Income	Dividend and interest income received from Canadian sources, along with foreign income and withholding tax.	February 28, 2023	February 28, 2023
T5013 Statement of Partnership Income	Various sources of income (loss), deductions and capital gains (losses) from a limited partnership.	1 st run – March 16, 2023 2 nd run – March 25, 2023 3 rd run – March 30, 2023	1 st run – March 17, 2023 2 nd run – March 28, 2023 3 rd run – March 31, 2023
T5008 Statement of Securities Transactions	Reports the Proceeds of Disposition and Adjusted Cost Base of securities due to a sale, disposition, deemed disposition, redemption, cancellation or exchange/ conversion.	February 28, 2023	February 28, 2023
Information Slip Description	What Income is Reported?	Provider	Deadline
T4 Statement of Remuneration Paid	Employment income and benefits.	Employer	February 28, 2023
T4A(OAS) Statement of Old Age Security	Old Age Security (OAS) pension income.	Service Canada	February 1, 2023
T4A(P) Statement of Canada Pension Plan Benefits	Canada Pension Plan (CPP) benefit income.	Service Canada	February 1, 2023

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