

2023 Year End and Beginning of 2024 – Important Dates to Remember

DATE	DESCRIPTION
November 24, 2023	<ul style="list-style-type: none"> • Deadline to process minimum amount payments (ref. September 28, 2023 issue of the 360). • Deadline to process RRSP to RRIF (or LIRA to LIF) transfers for clients who turned 71 in 2023 (ref. September 21, 2023 issue of the 360).
December 8, 2023	<ul style="list-style-type: none"> • Pausing of T2023 RRIF and LIF transfers until January 3, 2024 (ref. 2023 Year-End Procedures – Administrative Bulletin). • Recommended deadline for capital gain and loss transactions to be processed for the current year (ref. 2023 Year-End Procedures – Administrative Bulletin).
December 21, 2023	<ul style="list-style-type: none"> • Deadline to process withdrawals (or internal transfers) applicable for 2023 (ref. 2023 Year-End Procedures – Administrative Bulletin). • Payment of commissions received from fund companies between December 15 and 21, 2023.
December 22, 2023	<ul style="list-style-type: none"> • Head Office is open, but with reduced staff.
December 28, 2023	<ul style="list-style-type: none"> • Payment of commissions received from fund companies between December 22 and 28, 2023.
December 31, 2023	<ul style="list-style-type: none"> • Deadline to send temporary income requests. • Deadline to send automatic free unit switch requests
January 2, 2024	<ul style="list-style-type: none"> • Head Office is open, but with reduced staff.
January 3, 2024	<ul style="list-style-type: none"> • Processing of T2033 RRIF and LIF request resumes (ref. 2023 Year-End Procedures – Administrative Bulletin).
Week of January 8 to 12, 2024	<ul style="list-style-type: none"> • Calculation of minimum and maximum amounts for 2024. You will receive a communication to notify you of the updated amounts.
January 29, 2024	<ul style="list-style-type: none"> • First contribution receipts are being sent by Head Office for the period of March 2 to December 31, 2023
At the latest on February 29, 2024	<ul style="list-style-type: none"> • Mailing of tax slips by Head Office. • Mailing of fee-based invoices for Investia non-registered nominee accounts.
By February 29, 2024, at midnight	<ul style="list-style-type: none"> • Deadline to make RRSP contributions for 2023 (end of first-60-day period)