

Administrative Bulletin

2024 RRSP Season



IMPORTANT DATES – INVESTMENT PERIOD

The deadline for RRSP contributions for the 2023 fiscal year is **Thursday, February 29, 2024**.

From January 1 through February 29, 2024, at 11:59 p.m.

A contribution receipt will be issued for all electronic orders processed in Univeris during the first 60 days of the year.

From March 1 through 4, 2024, at 4 p.m.

Electronic orders will be designated “First 60 days” if they meet the following criteria:

- Documents signed and dated at the latest on **February 29, 2024**;
- Cheques dated at the latest on **February 29, 2024**;
- Upon order entry, you must select “First 60 days” for the client to receive a contribution receipt.

The “Contribution Period” option will be available on March 1, 2024:

The screenshot shows the 'Order' tab in the Univeris system. The 'Contribution Period' dropdown menu is highlighted with a red box and set to 'First 60 Days'. A text box on the right states: 'N/A: receipt issued for 2024' and 'First 60 days: receipt issued for 2023'.

From March 4, 2024, 4:01 p.m., and onward

No first 60-day contribution receipts will be generated for transactions entered after 4:00 p.m. on Monday, March 4, 2024, EST.

IN-KIND CONTRIBUTIONS

RRSP season is well underway, which means that non-registered plan to registered plan in-kind transfers have become increasingly frequent. For information regarding this type of transfer, we invite you to refer to Administrative Procedure # 51 – *Internal Cash or In-Kind Transfers Between Two Nominee Accounts*.

TAX SLIPS FOR INVESTIA NOMINEE ACCOUNTS

- Contribution receipts (new deposits and preauthorized chequing plans) for the period from March 2, 2023, to December 31, 2023, will be issued at the end of January 2024, and then in February we will start

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sending receipts for first-60-day contributions. These will include transfers from an Investia non-registered plan to an Investia registered nominee plan.

- 2023 T4RSPs, T4RIFs, T5s, T5008 for exchange traded funds, RL-2, RL-3 and RL-18 slips (province of Quebec) pertaining to Investia registered nominee plans will be issued at the latest on February 29, 2024.
- For exchange traded funds, T3 and RL-16 (province of Quebec) for 2023 will be available at the latest on March 31, 2024.
- NR4 tax slips for 2023 will also be available at the latest on March 31, 2024.
- Finally, for fee-based fees, clients' invoices will be posted on the Investia Client Portal at the latest on February 29, 2024.

Have a successful 2024 RRSP season!