



2023 Tax Slips and Statements Mailing Schedule*

DOCUMENTS

Registered Plans Client Statements and Registered Tax Slips: T4A, T4RSP, T4RIF, T4FHSA, NR4, Relevé 1, Relevé 2, Releve 32, remainder of the Year (2023) contribution receipts.

Client tax slips and statements (where applicable) are combined and mailed together in the same envelope.

Investors registered for eDelivery (email notification sent)

IRS Tax Slips (1099B, 1099DIV)

Non-Registered plans client statements and non-registered tax slips: T3, T5, NR4, T5008, Relevé 3, Relevé 16 and Relevé 18.

Investors registered for eDelivery (email notification sent)

Household Client Statements and Tax Slips**

Household refers to statements and tax slips for both registered and non-registered accounts that are combined and mailed in the same envelope.

1st 60 days (2024) contribution receipts

Investors registered for eDelivery (email notification sent)

MAILED/NOTIFIED

January 22–25, 2024

January 5–18, 2024

January 30, 2024

February 1–February 14, 2024

January 24–25, 2024

February 15–26, 2024

March 11, 2024

March 7, 2024

* Dates could be subject to change.

** Documents are householded if this service is requested by the investor(s) or done automatically if an investor has multiple Fidelity accounts with the same registration information.