



THE JOHNSON LEGACY REPORT

Building Trust for Generations



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As we approach the upcoming season, we would like to provide you with some pertinent information on what to expect from Raymond James in preparation for your income tax return.

2019 TAX RECEIPT SCHEDULE

Online Tax Receipts

Raymond James Ltd. is pleased to offer you an electronic delivery option for your 2019 tax receipts. You can elect to receive your electronic receipts on-line on our client website at <https://client.raymondjames.ca/>. This secure “paperless” option replaces the traditional paper mailing of all your receipts and our online system will automatically notify you via email as each receipt is posted. To join our paperless campaign, please visit our website or give us a call.

If you have chosen the mailing route, here is some pertinent information regarding the estimated tax receipt mailing dates to help you organize for the upcoming tax season.

Table Of Dates

Federal & US Forms	Expected Mailing Date
1099-B, 1099-DIV, 1099-INT, 1099-MISC – IRS Reporting (US Persons)	February 15, 2020
T4A – RESP Income	February 28, 2020
T4RSP & T4RIF – RRSP and RRIF Income	February 28, 2020
T5008 – Return of Securities Transactions & Trading Summary	February 28, 2020
T5 & Summary of Investment Income – Dividend and Interest Income	February 28, 2020
Foreign Asset Verification Report	February 28, 2020
T3 – Canadian Trust Income	March 31, 2020
T5013 – Canadian Limited Partnership Income	March 31, 2020
NR4 – Canadian Income Paid to Non-Residents	March 31, 2020
NR4 – RRSP and RRIF Income Paid to Non-Residents	March 31, 2020

Points to remember:

- All tax receipts issued by Raymond James Ltd. will be issued to the primary address and SIN/Tax Identification number on file with us.
- All T5 and T3 tax receipts for Mutual Fund investment income are issued directly by the fund companies (not by Raymond James Ltd.).

2019 RRSP contribution receipts

The RRSP contribution deadline for the 2019 taxation year is Monday, March 2, 2020. RRSP contribution receipts for the remainder of 2019 (encompassing all contributions made between March 2, 2019 and December 31, 2019) will be mailed by the end of January. All RRSP contribution receipts for the first 60 days of 2020 (encompassing all contributions made January 1, 2020 to March 2, 2020) will be consolidated and mailed together by mid-March. Please note that electronic copies of the RRSP contribution receipts will be available on our website for viewing and retrieval by the end of January 2020, with new receipts being posted on a weekly basis as they become available for contributions made in the first 60 days of 2020.

TSS-122019E



As always, we will continue to support you and your tax preparer throughout tax season. If you haven't done so and wish to give us permission to communicate with your tax preparer, please provide us with the contact information.

Market Pulse:

Major Stock Indexes	Level/Price	YTD Return Ending Jan 31/20
S&P/TSX Comp	17,318	1.49%
S&P 500 Comp	3,226	-0.16%
Dow Jones Industrial Avg	28,256	-0.99%
Major Bond Index		
Dex Universe	1,156	2.91%
Commodities		
Crude Oil - WTI (US\$/bbl)	\$51.68	-15.36%
Gold (US\$/oz.)	\$1,578	3.58%
N. Gas (US\$/MMBtu)	\$1.87	-14.57%
Currency		
Canadian Dollar (CAD/USD)	\$0.76	-1.83%

Source: Bloomberg.

Personal Updates:

Lori has been entertaining and hibernating! She had family visit from California one weekend and friends from Calgary another weekend. Lori's condo is set up like a boutique hotel so there is no shortage of guests! Other than that she has been disciplined with her work outs, yoga and pilates.

Jay and the family were battling the cold and flu for almost the entire month of January, however, they have been able to enjoy a few ski days at Big White in between Tucker's hockey games. February will be much of the same with weekend skiing and lots of driving back and forth to the rink. There is one final hockey tournament in Cloverdale before the hockey season comes to an end.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual funds. Please read the prospectus before investing. The indicated rates of return are the historical annual compounded total returns including changes in unit value and reinvestment of all distributions and does not take into account sales, redemption, distribution or optional charges or income taxes payable by any security holder that would have reduced returns. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

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