

Accessing and Managing Tax Documents through RBC Online Banking

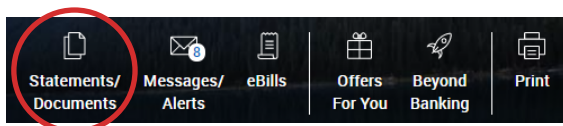


Available since 2018, receiving your tax documents electronically has been a secure, convenient and efficient way to keep track of your documents and have them at your fingertips, as soon as they become available.

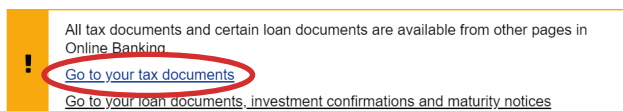
Accessing your tax documents in online banking is easy as there's no waiting and you'll have access to up to 7 years of documents starting from 2018. As soon as the documents are produced, you will receive a message in your **Online Banking Message Centre** letting you know. If you've also provided us with your email address, you will also receive an email notification.

How to Access your Tax Documents

- 1 Have your client card and password ready when signing into your RBC Online Banking account: [Online Banking Sign in Page](#)
- 2 From the **Accounts Summary** page, select **Statements/Documents** located near the top right of the page.



- 3 The **View and Manage Documents** page will open, and you will need to select the **Go to your tax documents** link located in the yellow information box at the top of the page.



4 Your **Tax Documents** page will open and if you select your delivery preference as **Electronic**, you can then:

- Select the year you wish to view from the drop down list.
- Or select from the tax documents listed.

A pop up window will appear and you will be able to click to download as a PDF and save the document(s) to your computer.

Your Tax Documents

Download tax documents for your RBC accounts.

To learn more about tax documents, check out our [frequently asked questions](#)

Delivery preference

Electronic Paper

Tax Year

2020 

Type	Document Name
RSP Contribution Receipt	RBSP Contribution Receipt

How to Change your Tax Document(s) Delivery Preference to Paper

If you wish to switch to paper, please note that once the preference is switched to paper, **you will no longer be able to view your tax documents through your RBC Online Banking account**. Any document that has already been provided electronically will not be mailed to you automatically, if you change your preference now.



IMPORTANT!

Save or print your tax documents prior to switching to paper.

1 From Your **Tax Documents** page, select **Paper** instead of **Electronic**.

Delivery preference

Electronic Paper



2 A **Switch to paper tax documents** pop up will appear with the **Terms and Conditions** for you to review.

3 Click the box to acknowledge that you accept the **Terms and Conditions**.

4 Click the **Switch to Paper** button.

Switch to paper tax documents

Get your RBC tax documents in regular mail. You'll no longer have access to electronic tax documents.

Revocation of Consent to Receive Electronic Delivery of Documents for Banking Products

You have chosen to receive tax documents for all of your accounts in paper form. Your switch from electronic to paper will take effect immediately, although you will not receive paper tax documents until the next time tax documents are issued for your account(s). You will no longer be able to view electronic copies of current and previous tax documents for your account(s).

A detailed confirmation of your request will be sent to your Online Banking Message Centre, where it will be available for 90 days from the date we first sent it to you, unless deleted by

By clicking this box and "Switch to Paper" below, you agree to switch to paper tax documents as set out in the terms and conditions above.

[Save a copy](#)

Switch to Paper

Cancel

5 You will then return to **Your Tax Documents** page and your **Delivery preference** will now display as **Paper**.

For more tutorials on completing banking transactions, visit rbc.com/howto.

