

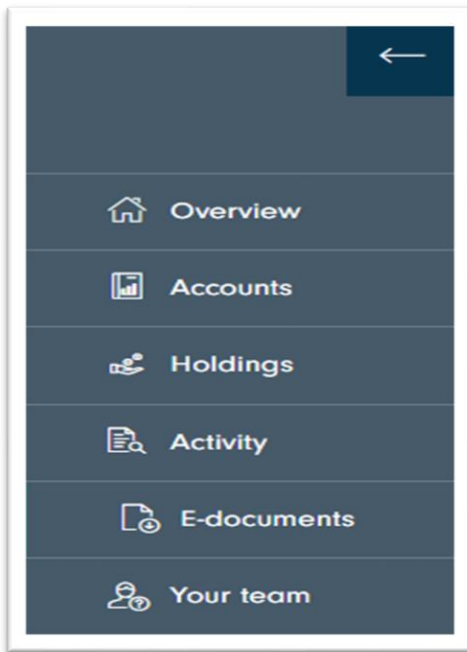
Client guide

Finding your tax slips on Investor Portal

This guide shows you how to find your tax slips on Investor Portal and adjust document filters to view older documents that may be hidden by default.

Where to start

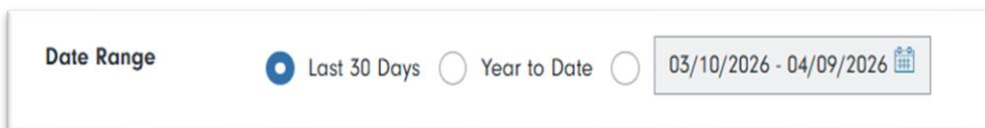
From the main side bar menu, choose **E-documents**.



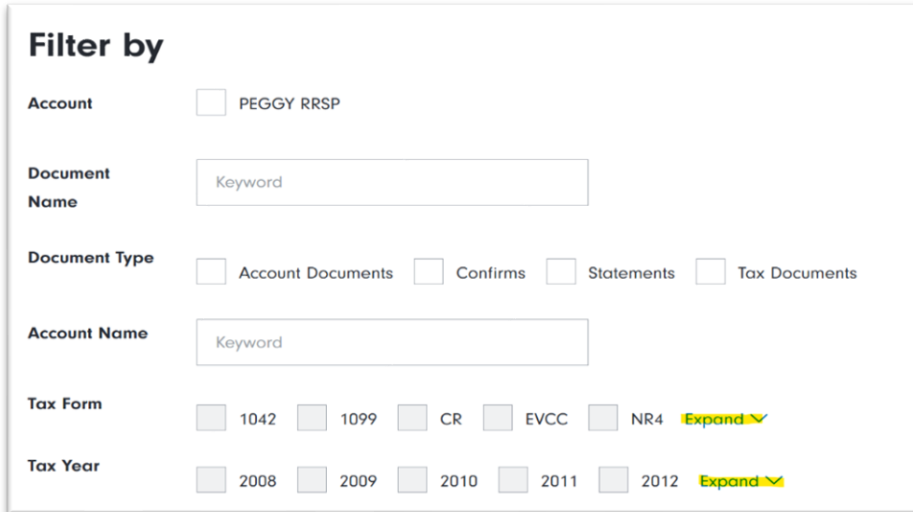
Use filters to find your tax slips

When you open **E-documents**, some documents may be hidden based on the default filter settings. If you don't see your tax slips right away, follow these steps:

- Select **Expand** to view all filter options
- If the date range is set to **Last 30 days**, change it to **Year to Date** or select a **customized date range**
- Under document type, make sure **Tax Documents** is selected
- Select **Apply** to refresh your results



Documents > E-documents > click **Expand** filters option:



Filter by

Account PEGGY RRSP

Document Name

Document Type Account Documents Confirms Statements Tax Documents

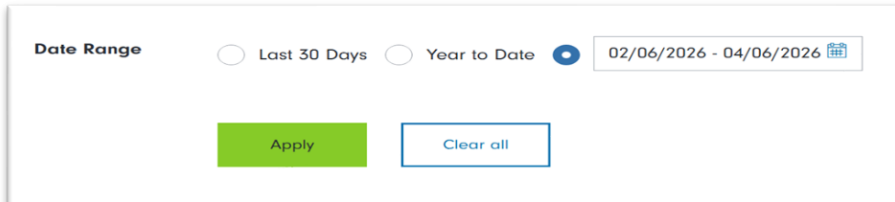
Account Name

Tax Form 1042 1099 CR EVCC NR4 **Expand** ▼

Tax Year 2008 2009 2010 2011 2012 **Expand** ▼

Filters panel with the date range updated beyond the **Last 30 days**:

If you've searched and are still having issues with locating specific documents, try to clear all the filters and only adjust the customized date range to the end of the last year. This will show all documents available, and clicking **Show More** will reveal more documents in release order.



Date Range Last 30 Days Year to Date 02/06/2026 - 04/06/2026 📅

Apply **Clear all**

Why you may not see a tax slip

There are a few common reasons a tax slip may not appear online:

- The tax slip hasn't been issued yet
- The account was closed during the tax year
- The tax slip may be available through another Manulife portal or issued directly by the fund company that manages the investment
- The setting that allows clients to manage document preferences is turned off in Investor Portal Admin; it can be enabled by the advisor or the online help desk

Helpful tips

- Most tax slips are available in February and March
- You can access older documents by adjusting your date filters
- Statements, trade confirmations, and tax slips are different document types and may appear separately

Need help?

If you still can't find your tax slip, contact Manulife Wealth Investor Support at 1-800-361-3119 or manulifewealthsupport@manulife.ca.