The Di Rocco Keenan Wealth Advisory Group

FEBRUARY 2026

February often marks the point when tax season starts to feel a bit more serious. For many, preparing for taxes can feel almost as daunting as training for the Olympics — especially when paperwork starts arriving from all directions. With the Winter Olympics currently underway in Italy, it's a good reminder that even elite athletes don't show up on competition day without months of preparation and support!

What to Expect Over the Next Few Weeks

If you made RRSP contributions during 2025, those receipts were issued in January. Contributions made in the first 60 days of 2026—often done to top up before the deadline—are issued starting in late January and continue on a rolling basis into February. Withdrawals from registered plans such as RRSPs, RRIFs, RESPs, and FHSAs are typically reported by the end of February.

For non-registered accounts, many clients receive a tax package in late January that outlines which slips to expect and includes important supporting information such as foreign asset reporting and annual fees. Investment income and trading activity slips generally follow in late February, while capital gain & loss reports, trusts, ETFs, and partnership slips often arrive in March. This staggered timing is completely normal, especially for clients with diversified portfolios. **Please see the 2025 Tax Document Schedule attached**.

A Few Helpful Best Practices from Our Team

Teresa's Tax Tip:
"One of the simplest ways to reduce stress is to create a single tax folder—either digital or paper—and add documents as they arrive. That way, when it's time to file, everything is already in one place. Also, as a reminder, with your permission we can grant your Accountant access to your tax slips via Gateway. If you have already set this up in the past, no action is required, other than maybe a quick reminder to your Accountant."

Bailey's Best Practice:
"Waiting until all slips are in before filing can save a lot of frustration. Some of the most important documents don't arrive until March, especially for ETFs and trusts, so patience really does pay off."

Joti's Planning Insight:
"Tax season is a great time to look beyond filing and think ahead. Reviewing RRSP and FHSA contribution room, or planning withdrawals more thoughtfully, can make a meaningful difference over time."

Daryna's Planning Tip:

"If something doesn't look right on a tax slip—or if you're unsure what it's reporting—it's worth asking before filing. Catching questions early can prevent follow-ups and amended returns later on."

Lianne and Jamie

The Di Rocco Keenan Team at Daily Bread Food Bank!

On February 3rd, we were alongside the BMO team for an afternoon of volunteering at the Daily Bread Food Bank. Together, we sorted 1,091 lbs of granola into containers! That's nearly 6,250 granola bars. Each container of granola that we prepared will feed a family of 4. We were honoured to be able to contribute our time to an incredibly meaningful cause.