

## Where to find your Worldsource tax documents

Starting in February, Worldsource will be releasing your tax documents to your investor portal account.

- When logging in, click on E-documents in the top right corner
- You can then filter by document type, tax year, and date range
  - o If you are checking within February or March, you can select “*Last 30 Days*”
  - o If you are checking at any other point in the year after March, select “*Year to Date*”
  - o You may also obtain past years documents by selecting the tax year you want and providing a date range

Should you not have access to [worldsource.myinvestorportal.ca](https://worldsource.myinvestorportal.ca), please reach out to Leslie Kay for assistance in signing up; she may be reached by e-mail: [Lkay@worldsourcecurities.net](mailto:Lkay@worldsourcecurities.net) or by phone at **519-835-9479**.



Profile Messages

Overview Accounts Holdings Activity **E-documents** Your team

**Filter by**

Account	Document Name	Document Type
All	Keyword	Tax Document
Account Name	Tax Form	Tax Year
Keyword	All	2022
Date Range		
<input type="radio"/> Last 30 Days <input type="radio"/> Year to Date <input checked="" type="radio"/> 01/01/2022 - 12/31/2022		
<input type="button" value="Apply"/> <input type="button" value="Clear all"/>		