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Canada Revenue Agency / Agence du revenu du Canada

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Do not use this area

Group Income Tax and Information Return for RRSP, RRIF, RESP, or RDSP Trusts

The sections we refer to in this return are from the *Income Tax Act*. You can find the worksheets and forms you need to complete this return on our Web site at **www.cra.gc.ca** or by calling **1-800-959-8281**. **Do not** include them with this return. If you are required to pay tax under subsection 207.1(5), complete Form T2000,*Calculation of Tax on Agreements to Acquire Shares*. To report taxable income or claim a Part XII.2 tax credit, complete Form T3RET, *T3 Trust Income Tax and Information Return.* You can get a copy of Guide T4013, *T3 Trust Guide* and the *T3 Trust Forms Package* from our Web site at **www.cra.gc.ca** or by calling **1-800-959-8281**.

Send one completed T3GR return, no later than 90 days after the end of the calendar year. You can find the address on page 2 of this return. If you are an RRSP or RRIF trust that is taxable under 207.05(1) in the year, for the purposes of that provision, the return must be filed with a payment for any balance due no later than June 30th following the end of the calendar year. If you do not file this return on time, we will charge penalties and charge interest on any amount owing.

Attach a list of all taxable RRSPs, RRIFs, RESPs, or RDSPs registered under this specimen plan or fund. The list must contain the number of the plan or fund, the name and social insurance number of each person who is an annuitant, holder or subscriber under the plan or fund and the amount and type of tax. A comparable list of RRSPs, RRIFs, RESPs, or RDSPs that are not taxable must be available if we request it.

Is this an amended return? ☐ Yes ☐ No	Is this return a first year filing? ☐ Yes ☐ No
I am completing this return for a group of (check one): RRSPs ☐ RRIFs ☐ RESPs ☐ RDSPs ☐	
Name of specimen plan or fund	Specimen plan or fund approval number
Name of trust company / Telephone number	Trust account number
Trustee's address	Address to send notice or correspondence (if different from trustee's address)
Address where the trust keeps its books and records (if different from trustee's address)	Calendar year for this return / Province or Territory of residence of the plan or fund
Your language of correspondence: English ☐ French ☐	Total assets of specimen plan or specimen fund as of December 31 of the calendar year **700** $

Specimen plan or fund information

Number of new RRSPs, RRIFs, RESPs, or RDSPs conforming to the specimen plan or fund as of December 31 of the previous year	711		1
Number of new RRSPs, RRIFs, RESPs, or RDSPs conforming to the specimen plan or fund entered into in the year that are, or will be, registered	712	+	2
Number of RRSPs, RRIFs, RESPs, or RDSPs already registered that were transferred to, or amalgamated with, the specimen plan or fund by an amendment in the year	713	+	3
Add lines 1 to 3. This is the total number of RRSPs, RRIFs, RESPs, or RDSPs under this specimen plan or fund during the calendar year	714	=	4
Number of RRSPs, RRIFs, RESPs, or RDSPs for which registration was terminated during the year (include: terminations that occur as a result of a transfer to another plan or fund)	715	–	5
Line 4 **minus** line 5. This is the total number of RRSPs, RRIFs, RESPs, or RDSPs under the specimen plan or fund as of December 31 of the calendar year	716	=	6

Additional specimen plan or fund information

Number of RRSPs, RRIFs, RESPs or RDSPs from line 4 that are taxable under subsections 207.1(3), (5), 206.2(1), 206.3(1), or 207.05(1)	717		7

If line 7 is greater than zero, complete the summary of tax or refund on the next page.

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Summary of tax or refund

Tax under subsection 207.1(5) on agreements to acquire shares (from Form T2000 on our Web site)	140 •		8
Tax under subsection 207.1(3) on non-qualified investments (from Worksheet T3GR-WS on our Web site)	150 •	+	9
Tax under subsection 206.2(1), or 207.05(1) on advantages extended by the issuer of the plan or by a person not dealing at arm's length with the issuer	153 •	+	10
Tax under subsection 206.3(1) on property held by the trust used as security for indebtedness	155 •	+	11
Total tax payable (**add** lines 8 to 11)	190 •	=	12
Minus: Payments on account	010 •	–	13
Balance owing or refund (line 12 **minus** line 13)	090 •	=	14
Generally, we do not charge or refund $2 or less.			
Amount enclosed	095 •		15

Payment: Attach a cheque or money order payable to the Receiver General. Do not mail cash.

Refund: Complete the area below or complete Form T3-DD, *Direct Deposit Request for T3*.

Direct Deposit – Start or change

This area does not have to be completed every year. Do not complete this area if the trust's direct deposit information has not changed.

To **start** direct deposit or to **change** information already provided to the Canada Revenue Agency (CRA), the trustee or person authorized by the trustee must complete **Form T3-DD**, *Direct Deposit Request for T3,* or complete the banking information below. By signing and dating this form, you certify that you are an authorized person and that the information given on the form is correct and complete. You also **authorize** the CRA to deposit **any amounts payable** to the trust by the CRA in the trust's bank account provided, until otherwise notified by an authorized person. This authorization will replace all of the trust's previous direct deposit authorizations.

"VOID" cheque attached: Yes ☐

350 • Branch No. (5-digit number)

351 • Institution No. (3-digit number)

352 • Bank account number (maximum 12-digit number)

Certification

I, ______________________ , of ______________________

(Print name) (Address)

certify that the information given in this return and on related slips is correct and complete.

______________________ Signature of trust company official

______________________ Date

______________________ Position or title

Where do I send this return?

If the trustee address is based in:	Send this return to:
Northwest Territories, Yukon, British Columbia, Alberta, Manitoba, New Brunswick, Nova Scotia, Prince Edward Island, Newfoundland and Labrador, Montreal Quebec, Laval Quebec or Sherbrooke Quebec	**Summerside Tax Centre** Canada Revenue Agency 275 Pope Road Summerside PE C1N 6A2
Nunavut, Saskatchewan, Ontario and the remainder of the Province of Quebec not listed above	**Ottawa Technology Centre** Canada Revenue Agency 875 Heron Road Ottawa ON K1A 1A2