



T3 Pooled Registered Pension Plan Tax Return

Do not use this area.

- Complete this return for the 2014 tax year for a qualifying pooled registered pension plan (PRPP) as defined on page 2 of this return.
- File this return no later than 90 days after the end of the trust's tax year.
- We will charge penalties if this return is not filed on time. We charge interest at the prescribed rates on any amounts owing.
- Send one completed T3 PRP return to the trust's tax centre. You can find the address on page 2 of this return.

Unless otherwise stated, the sections, subsections, and paragraphs we refer to in this return are from the *Income Tax Act*.

Is this an amended return? <input type="checkbox"/> Yes <input type="checkbox"/> No		Is the return a first year filing? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Name of plan		Account number (if one has been assigned)	
Name of trustee		Plan Registration Number	
Mailing address of trustee		Telephone number	
Address where the trust keeps its books and records (if different from address above)		Tax year of the return	
Names of other trustees	Province or territory of residence of the plan	Your language of correspondence: English <input type="checkbox"/> French <input type="checkbox"/>	
Give the date the trust:			
came into existence (effective date of registration) ▶		ceased to exist ▶	
Year Month Day		Year Month Day	
If the trust transferred the plan assets to a new trust, or insurance company, give the name of the new trust, or insurance company, and the date the funds were transferred.			
Name of new trust, or insurance company		Year Month Day	

Summary of tax or refund

Tax payable under subsection 207.1(5) on agreements to acquire shares (from line 11 of Schedule on the next page) . . .	140 •	7
Minus: Payments on account	010 • -	8
Balance owing or refund (line 7 minus line 8)	090 • =	9
If the result is negative, you have a refund . If the result is positive, you have a balance owing . Generally, we do not charge or refund \$2 or less.		
Amount enclosed	095 •	10

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 •	351 •	352 •
Branch No. (5-digit number)	Institution No. (3-digit number)	Bank account number (maximum 12-digit number)

Schedule 1 – Tax under subsection 207.1(5) on agreements to acquire shares

If the trust entered into an agreement (other than for the acquisition, or the writing by it, of an option listed on a designated stock exchange) to acquire shares of the capital stock of a corporation (other than from the corporation) at a price that differed from their fair market value when acquired, it may have to pay tax under subsection 207.1(5).

If this is the case, complete Form T2000, *Calculation of Tax Agreements to Acquire Shares*, and attach it to this return.

Enter the amount determined on Form T2000.

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Certification

I, _____, of _____
 (Print name) (Address)

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

 Signature of trustee or trust company official

 Position or office (if trustee is a corporation)

 Telephone number

 Date

Information and instructions

A PRPP is an accessible, straightforward retirement savings option for employed and self-employed individuals.

As a trustee of a trust governed by a PRPP, complete all applicable schedules. Enter "Nil" in any area of a schedule that does not apply.

Custodial trustees whose only function is to hold individual annuity contracts and who are not the trustees of a plan should not complete this return.

When a trustee does not act as administrator of the plan, the trustee is still responsible for obtaining and reporting the required information on this return.

Attach a statement of the plan's assets at the end of the tax year and a reconciliation of the year-end balance in the plan with that of the immediately preceding year.

If the plan is not registered under the *Income Tax Act* throughout its period of operation or existence during the tax year, the income may be taxable. To report taxable income or claim a Part XII.2 tax credit, complete a 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.

Tax year refers to the calendar year for a pooled registered plan.

Where do I send this return?**If the trustee address is based in:**

Northwest Territories, Yukon, British Columbia,
 Alberta, Manitoba, New Brunswick, Nova Scotia,
 Prince Edward Island, Newfoundland and Labrador,
 Montreal Quebec, Laval Quebec or Sherbrooke Quebec

Nunavut, Saskatchewan, Ontario and
 the remainder of the Province of Quebec not listed above

Send this return to:

Summerside Tax Centre
 Canada Revenue Agency
 275 Pope Road
 Summerside PE C1N 6A2

Ottawa Technology Centre
 Canada Revenue Agency
 875 Heron Road
 Ottawa ON K1A 1A2