

Welcome to the Charities Information Webinar

Please stand by, we will be starting shortly.



LAND ACKNOWLEDGEMENT
RECONNAISSANCE DES TERRES



Canada Revenue
Agency

Agence du revenu
du Canada

UNCLASSIFIED

Completing your T3010 online: A walkthrough for charities

For charities and registered national arts
service organizations (RNASO)

To familiarize you
with the online T3010
and highlight its
various features.



Objective

Overview

- Advantages of completing your T3010 online
- Before you begin
- Getting started
- Completing sections
- Completing schedules
- Upcoming changes to the T3010

The background of the slide is an abstract composition of numerous overlapping triangles in various colors, including shades of pink, red, orange, yellow, green, and blue. The triangles vary in size and opacity, creating a complex, layered effect.

Advantages of completing your T3010 online

Advantages of completing your T3010 using online services

- Faster processing and no more postage
- Accurate data
- Sections and schedules you complete at your leisure
- Start and stop the return at any time. Clicking “next” saves the information up to that point
- Progress bars and status columns help you navigate
- Multiple individuals can work on it
- Print the return for your records once you’ve submitted it



Before you begin

Information to have on hand

- Any annual and project reports
- Books and records
- Financial statements, including:
 - List of qualified donees your charity transferred funds to
 - List of non-qualified donees (grantees) your charity made grants to
- List of directors during the fiscal period and their contact information
- List of intermediaries outside Canada
- Excess corporate holdings for private foundations

Do not include

- ⊗ Amended governing documents
- ⊗ Fiscal period-end change requests
- ⊗ Other correspondence

Other considerations

- Inactive charities must still file a return
- No longer in operation
 - Voluntary revocation
 - [Consequences of revocation](#)
- Fiscal period end changed
 - Separate return for the months between
- Disbursement quota reduction
 - File [T1240](#) to correct the return for the fiscal period in which the shortfall occurred

The background of the slide is a complex, abstract geometric pattern composed of numerous overlapping triangles. The colors transition from deep purples and blues at the bottom to bright yellows and greens at the top, creating a sense of depth and movement. The triangles vary in size and opacity, giving the background a layered, crystalline appearance.

Getting started

Access your organization's account through MyBA

- Instructions on how to register:
 - [My Business Account for charities - Canada.ca](#)
- Ready to log in:
 - [CRA sign-in services - Canada.ca](#)

My Business Account (1/5)

Select the service you would like to sign in / register for.

My Account

Access your own information:

- Individuals

My Business Account

Access your business information:

- Business owners
- Partners
- Directors/trustees on a board
- Officers of a non-profit organization

Represent a Client

Access someone else's business or individual information, including your employer:

- Accountants
- Tax and payroll service providers
- Employees
- Legal representatives (power of attorneys, trustees, etc.)
- Family and friends

My Business Account (2/5)



Government
of Canada

Gouvernement
du Canada

[Français](#)

Canada Revenue Agency
My Business Account



CLIENT NAME FOR 891828444 ▾
891828444

Business number (BN)

891828444 ▾

Navigation

[Overview](#)

[Profile](#)

[Payroll](#) >

[Corporation Income Tax](#) >

[Registered charity](#) ▾

RR0001

RR0004

RR0005

RR0008

RR0009

RR0010

Overview

[Help](#)

As of May 13, 2024

[Print/Save](#)

Missing phone number

One or more phone number(s) are missing on your account.

[Verify and update the phone number\(s\).](#)

Missing direct deposit information

One or more of your account(s) are missing direct deposit information.

[Verify and update the direct deposit information.](#)

Business balance and services ⓘ

Outstanding returns: **No**

Total amount owing: **\$0.00**

[Manage pre-authorized debit](#) [Manage pre-authorized debit\(SPR\)](#) [Direct deposit transactions](#)

[Filing and balance confirmation](#)

Progress tracker ⓘ

View the status of files that you have submitted to CRA.

Files shown are in progress or have been completed in the past 30 days.

My Business Account (3/5)



Government
of Canada

Gouvernement
du Canada

Canada Revenue Agency
My Business Account

YOUR BUSINESS NAME
BN: 123456789



Mail



Submit
documents



Profile

Sign out

Navigation

Overview

GST/HST

Payroll

Corporation Income Tax

Excise duty

Excise tax

Excise tax on insurance
premiums

Air Travellers Security
Charge

Fuel Charge

Luxury Tax

Registered Charity

Information Returns

TFSA

Partnerships

Contract Payments

Registered charity

RR0001 Overview

As of May 16, 2022

[Help with this page](#)

Registered charity

File

- [File a return](#)
- [Adjust a return](#)



Manage

- [Apply to be a registered charity or RCAA](#)
- [Update registered charity or RCAA information](#)

View

- [View expected and filed returns](#)
- [View program account details](#)
- [View application status](#)

Request

- [Request relief of penalties and interest](#)

My Business Account (4/5)



Government
of Canada

Gouvernement
du Canada

Canada Revenue Agency

 Sign out

[Home](#) > [My Business Account](#)


File a return


Fiscal periods with expected and overdue returns

BN/Account number : 123456789 RR0001

Organization name : Your Name

Expected returns

Select	Fiscal period	Due date	Status	Progress
<input checked="" type="radio"/>	2018-04-01 to 2019-03-31	2019-09-30	Expected	
<input type="radio"/>	2017-04-01 to 2018-03-31	2018-09-30	Overdue	
<input type="radio"/>	2016-04-01 to 2017-03-31	2017-09-30	Overdue	
<input type="radio"/>	2015-04-01 to 2016-03-31	2016-09-30	Overdue	
<input type="radio"/>	2015-01-01 to 2015-03-31	2015-09-30	Overdue	

 Fill out the return

[Return to homepage](#)

My Business Account (5/5)

T3010 Registered Charity Information Return

Privacy statement

[Review privacy statement](#)

Name: **ACCOUNT NAME FOR 123456789 RR 0001**
BN/Registration number: **123456789RR0001**
Fiscal period: **April 01, 2018 to March 31, 2019**

Review the following privacy statement:

Personal information is collected under the authority of the Income Tax Act and is used to establish and validate the identity and contact information of directors, trustees, officers, like officials, and authorized representatives of the organization. This information will also be used as a basis for the indirect collection of additional personal information from other internal and external sources, which includes personal tax information, and relevant financial and biographical information. Personal information will be used to assess the risk of registration with respect to the obligations and requirements as outlined in the Act and the common law. The social insurance number (SIN) is collected under subsection 237 of the Act and is used for identification purposes.

The Canada Revenue Agency (CRA) will make the information on this annual information return available to the public on the Charities Directorate website, except for information identified as confidential. Personal information may also be disclosed under information-sharing agreements and in accordance with section 241 of the Act. Incomplete or inaccurate information may result in compliance measures including revocation of registered status.

Personal information is described in personal information bank CRA PPU 200 and is protected under the [Privacy Act](#). Individuals have a right of protection, access to and correction or notation of their personal information. You are entitled to complain to the Privacy Commissioner of Canada regarding our handling of your information.

Notification to directors and like officials: The CRA strongly encourages the organization to voluntarily inform its directors and like officials that it has collected and disclosed their personal information to the CRA.

☐ * I confirm that I have read the Privacy statement above. *(required)*



Next

T3010 return - Overview

T3010 Registered Charity Information Return Overview

Name: **Test Charitable Foundation**
 BN/Registration number: **123456789RR0001**
 Fiscal period: **April 01, 2018 to March 31, 2019**

Review before you start

Is this return for you?

To assist you in filling out this form, refer to guide [T4033, Completing the Registered Charity Information Return](#).

Note: Even if a charity is inactive, a Registered Charity Information Return must be filed to maintain its registered status.

Completing this return

All charities must file a **complete** and **accurate** return within 6 months of its fiscal period end. Failure to do so can result in revocation of its registration status.

[Privacy statement](#)

Your progress

Section	Progress	Status	Action
Basic information sheet	<div></div>	Not Started	Start
Section A - Identification	<div></div>	Not Started	Start
Section B - Directors/Trustees and Like Officials	<div></div>	Not Started	Start
Section C - Programs and general information	<div></div>	Not	Start


Your progress

Section	Progress	Status	Action
Basic information sheet	<div><div></div></div>	Complete	Review
Section A - Identification	<div><div></div></div>	Complete	Review
Section B - Directors/Trustees and Like Officials	<div><div></div></div>	Incomplete	Continue
Section C - Programs and general information	<div><div></div></div>	Incomplete	Continue
Section D - Financial information	<div><div></div></div>	Not Started	Start
Schedule 1 - Foundations	<div><div></div></div>	Not required	Start
Schedule 2 - Activities outside Canada	<div><div></div></div>	Not required	Start
Schedule 3 - Compensation	<div><div></div></div>	Complete	Review
Schedule 4 - Confidential data	<div><div></div></div>	Not required	Start
Schedule 5 - Non-cash gifts	<div><div></div></div>	Not required	Start
Schedule 6 - Detailed financial information	<div><div></div></div>	Not required	Start



Completing sections

Basic information sheet

Section	Progress	Status	Action
Basic information sheet 	<div></div>	Not Started	Start
Section A - Identification	<div></div>	Not Started	Start
Section B - Directors/Trustees and Like Officials	<div></div>	Not Started	Start
Section C - Programs and general information	<div></div>	Not Started	Start

Basic information sheet Primary program areas

Name: ACCOUNT NAME FOR 123456789 RR 0001
 BN/Registration number: 123456789RR0001
 Fiscal period: April 01, 2018 to March 31, 2019

Program areas

Previously, charities were mailed an information return package that included Form TF725, Registered Charity Basic Information Sheet.


Did the charity receive a Registered Charity Basic Information sheet? 

☐ Yes

☒ No

Section A – Identification (1/3)

Your progress

Section	Progress	Status	Action
Basic information sheet	<div></div>	Not Started	Start
Section A - Identification 	<div></div>	Not Started	Start
Section B - Directors/Trustees and Like Officials	<div></div>	Not Started	Start
Section C - Programs and general information	<div></div>	Not Started	Start
Section D - Financial information	<div></div>	Not Started	Start
Schedule 1 - Foundations	<div></div>	Not required	Start
Schedule 2 - Activities outside Canada	<div></div>	Not required	Start
Schedule 3 - Compensation	<div></div>	Not required	Start

Section A – Identification (2/3)

T3010 Registered Charity Information Return

Section A - Identification

Position, operations, designation

Name: **ACCOUNT NAME FOR 123456789 RR 0001**

BN/Registration
number: **123456789RR0001**

Fiscal period: **April 01, 2018 to March 31, 2019**

Complete the following:


Web address (if applicable)

(Maximum 200 characters)

(Example: "http://www.charityabc.ca")

Section A – Identification (3/3)

Question A1

1510 Was the charity in a subordinate position to a head body? 

- ☒ Yes 
☐ No

Name

(Maximum 175 characters)

BN/registration number (if applicable)

(Maximum 15 characters)

(9 digits, 2 letters, 4 digits. Example: "123456789RR0001")


Question A2

1570 Has the charity wound-up, dissolved, or terminated operations? 

- ☐ Yes
☒ No

Question A3

To confirm the charity's designation, go to the CRA's [List of charities](#) and refer to the charity's detail page.

1600 Is the charity designated as a public foundation or private foundation? 


- ☒ Yes
☐ No

 Public foundations and private foundation **must** complete Schedule 1, Foundations. Schedule 1 is now available to you on the Overview page.

Next

Section B – Directors/Trustees and Like Officials (1/8)

Your progress

Section	Progress	Status	Action
Basic information sheet	<div></div>	Not Started	Start
Section A - Identification	<div></div>	Not Started	Start
Section B - Directors/Trustees and Like Officials 	<div></div>	Not Started	Start
Section C - Programs and general information	<div></div>	Not Started	Start
Section D - Financial information	<div></div>	Not Started	Start
Schedule 1 - Foundations	<div></div>	Not required	Start
Schedule 2 - Activities outside Canada	<div></div>	Not required	Start
Schedule 3 - Compensation	<div></div>	Not required	Start
		required	Start


[Change director - Canada.ca](#)

Section B – Directors/Trustees and Like Officials (2/8)

Section B - Directors/Trustees and Like Officials

Form T1235: Total number of directors/trustees and like officials

Name: ACCOUNT NAME FOR 123456789 RR 0001
BN/Registration number: 123456789RR0001
Fiscal period: April 01, 2018 to March 31, 2019

All charities must complete Section B, Directors/Trustees and Like Officials Worksheet (Form T1235). Only the public information of the worksheet is available to the public. 

Total number of directors/trustees and like officials

(Maximum 5 digits)

Next

[Return to overview page](#)

Section B – Directors/Trustees and Like Officials (3/8)

Form T1235: Add a director, trustee or like official

Name: ACCOUNT NAME FOR 123456789 RR 0001
BN/Registration number: 123456789RR0001
Fiscal period: April 01, 2018 to March 31, 2019

You **must** give us complete information for each director/trustee and like official who, at any time during the fiscal period of this return, was a member of the charity's board of directors/trustees. Directors/trustees and like officials are persons who govern a registered charity.

List of directors/trustees and like officials

Last name (public information)	First name (public information)	Initial (public information)	Term - Start date (public information)	Term - End date (public information)	Position (public information)	At arm's length (public information)	Residential address (confidential)	Phone number (confidential)
No data is available in the table								

Section B – Directors/Trustees and Like Officials (4/8)

List of directors/trustees and like officials

Last name (public information)	First name (public information)	Initial (public information)	Term - Start date (public information)	Term - End date (public information)	Position (public information)	At arm's length (public information)	Residential address (confidential)	Phone number (c
No data is available in the table								

Add director/trustee or like official ?

Last name (public information)

(Maximum 30 characters)

First name (public information)

(Maximum 30 characters)

Initial (public information)

(Maximum 3 characters)

Term ☐ Start date YYYY-MM-DD (public information) ?

Term - End date YYYY-MM-DD (public information) ?

Position (public information) ?

(Maximum 30 characters)

Section B – Directors / Trustees and Like Officials (5/8)

At arm's length with other Directors? (public information) ?

☐ Yes

☐ No

Residential address (confidential) ?

Address line 1 (confidential)

(Maximum 30 characters)

Address line 2 (confidential)

(Maximum 30 characters)

City (confidential)

(Maximum 30 characters)

Province/territory (confidential)

(Maximum 30 characters)

Postal code (confidential)

(Maximum 12 characters)

Phone number (maximum 20 digits) (confidential) ?

(Maximum 20 digits)

Date of birth YYYY-MM-DD (confidential) ?

Previous

Next

Section B – Directors/Trustees and Like Officials (6/8)

At arm's length with other Directors? (public information) ? 

- ☐ Yes
- ☐ No

Is the director/trustee or like official at arm's length with other directors?

At arm's length with other directors: Select yes if the person is at arm's length with all other directors/trustees or like officials.

At arm's length is a concept that describes a relationship in which two persons act independently of each other and are not related. Related persons are individuals who are related to each other by blood, marriage or common-law partnership, or adoption. It is also possible that individuals not related by a family connection, but by close business relations, may still be considered not at arm's length. For more information on arm's length, go to <https://www.canada.ca/en/revenue-agency/services/tax/technical-information/income-tax/income-tax-folios-index/series-1-individuals/series-1-individuals/income-tax-folio-s1-f5-c1-related-persons-dealing-arms-length.html>

Close

Section B – Directors/Trustees and Like Officials (7/8)



List of directors/trustees and like officials

Select (Column contains radio buttons to select the row)	Last name (public information)	First name (public information)	Initial (public information)	Term - Start date (public information)	Term - End date (public information)	Position (public information)	At arm's length (public information)	Residential address (confidential)	Phone number (confidential)	Date of birth (confidential)
<input type="radio"/>	Doe	Jane		2017-11-29	2018-09-29	Director	Yes	1234 Main St ANYTOWN, ON A1A 1A1	6135551111	1901-01-01

Modify selection

Delete selection



To enter information for another director/trustee or like official, select "Add another".

Add another

Select "Next" if you have no other directors/trustees, or like officials to add.

Previous

Next

Section B – Directors/Trustees and Like Officials (8/8)

Section B - Directors/Trustees and Like Officials

▼ Form T1235: Total number of directors/trustees and like officials

Change this

Total number of directors/trustees and like officials
3

▼ Form T1235: List of directors, trustees or like officials

Change this

Director/trustee and like official #1
Full name: **Test first name M Test name**
Term - Start date: **2017-11-29**
Term - End date: **2018-09-29**
Position: **Test position**
At arm's length: **Yes**
Residential address (confidential): **123 My Street Ottawa, Ontario K1A0A1**
Phone number (confidential): **6135551111**
Date of birth (confidential): **1957-04-18**

▼ Are you incorporated in Ontario?

Change this

Select one of the following:
The charity is incorporated in Ontario. We will complete Form RC232.


Form RC232, Corporations Information Act Annual Return for Ontario Not-for-Profit Corporation (2009 and later tax years), is now available to you on the Overview page.

Done with this section



Section C - Programs and general information (1/6)

Your progress

Section	Progress	Status	Action
Basic information sheet	<div></div>	Not Started	Start
Section A - Identification	<div></div>	Not Started	Start
Section B - Directors/Trustees and Like Officials	<div></div>	Not Started	Start
Section C - Programs and general information 	<div></div>	Not Started	Start
Section D - Financial information	<div></div>	Not Started	Start
Schedule 1 - Foundations	<div></div>	Not required	Start
Schedule 2 - Activities outside Canada	<div></div>	Not required	Start
Schedule 3 - Compensation	<div></div>	Not required	Start

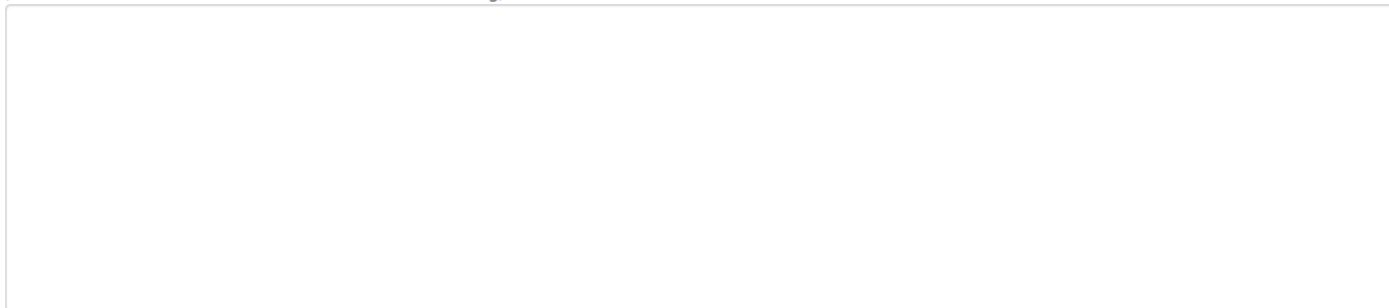
Section C - Programs and general information (2/6)

Question C2

Describe all **ongoing** and **new** charitable programs the charity carried on this fiscal period to further its purpose(s) (as defined in its governing documents). "Programs" includes all of the charitable activities that the charity carries out on its own through employees or volunteers as well as through qualified donees and intermediaries. The charity may also use this space to describe the contributions of its volunteers in carrying out its activities, for example, number of volunteers and/or hours. **Do not** include the names of employees or volunteers. Grant-making charities should describe the types of organizations they support. **Do not** describe fundraising activities in this space. ?

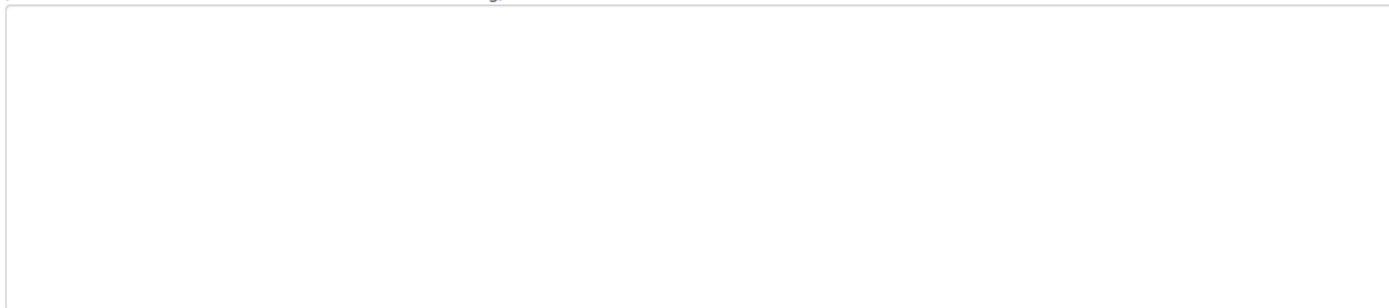
Ongoing programs

(Maximum 2500 characters, 2500 characters remaining)

A large, empty rectangular text box with a thin grey border, intended for describing ongoing charitable programs. It occupies the majority of the page width and height below the 'Ongoing programs' header.

New programs

(Maximum 2500 characters, 2500 characters remaining)


A large, empty rectangular text box with a thin grey border, intended for describing new charitable programs. It occupies the majority of the page width and height below the 'New programs' header.

Section C - Programs and general information (3/6)

- We operate a recycling service
- We give free meals to the homeless on a weekly basis
- We hold worship services weekly
- We offer dental services for people experiencing poverty in a specific country
- We clean up garbage along the waterfront in our community
- We operate an elementary school
- We operate a food bank and a clothing give-away program
- We financially support overseas missionary activities by gifting funds to our denomination headquarters, which is a registered charity
- We operate a senior-care program two times a week

Section C - Programs and general information (4/6)

Question C6

If the charity carried on fundraising activities or engaged third parties to carry on fundraising activities on its behalf, select all fundraising methods that it used during the fiscal period. 

Types of fundraising methods

(Select all that apply)


- ☐ 2500 Advertisements/print/radio/TV commercials
- ☐ 2510 Auctions
- ☐ 2530 Collection plate/boxes
- ☐ 2540 Door-to-door solicitation
- ☐ 2550 Draws/lotteries
- ☐ 2560 Fundraising dinners/galas/concerts
- ☐ 2570 Sales
- ☐ 2575 Internet
- ☐ 2580 Mail campaigns
- ☐ 2590 Planned-giving programs
- ☐ 2600 Targeted corporate donations/sponsorships
- ☐ 2610 Targeted contacts
- ☐ 2620 Telephone/TV solicitations
- ☐ 2630 Tournament/sporting events
- ☐ 2640 Cause-related marketing
- ☒ 2650 Other

2660 Specify

(Maximum 175 characters)

Section C - Programs and general information (5/6)

Question C7


2700 Did the charity pay external fundraisers? 

- ☒ Yes
☐ No


You **must** complete the following lines, and complete Schedule 4, Confidential data, Table 1. Schedule 4 is now available to you on the Overview page.

5450 (a) Enter the gross revenue collected by the fundraisers on behalf of the charity. 

CAN \$.00

5460 (b) Enter the amounts paid to and/or retained by the fundraisers. 

CAN \$.00

(c) Method of payment to the fundraiser. 

(Select all that apply)

2730 ☐ Commissions

2740 ☐ Bonuses

2750 ☐ Finder's fee


2760 ☐ Set fee for services

2770 ☐ Honoraria

2780 ☐ Other

2790 Specify

(Maximum 175 characters)

2800 (d) Did the fundraiser issue tax receipts on behalf of the charity? 

- ☐ Yes
☐ No

Section C - Programs and general information (6/6)

Question C11


4000 Did the charity receive any non-cash gifts for which it issued tax receipts? 

- ☒ Yes
- ☐ No

You **must** complete Schedule 5, Non-cash gifts. Schedule 5 is now available to you on the Overview page.

Section D - Financial information (1/9)

Your progress

Section	Progress	Status	Action
Basic information sheet	<div></div>	Not Started	Start
Section A - Identification	<div></div>	Not Started	Start
Section B - Directors/Trustees and Like Officials	<div></div>	Not Started	Start
Section C - Programs and general information	<div></div>	Not Started	Start
Section D - Financial information 	<div></div>	Not Started	Start
Schedule 1 - Foundations	<div></div>	Not required	Start
Schedule 2 - Activities outside Canada	<div></div>	Not required	Start
Schedule 3 - Compensation	<div></div>	Not required	Start

Section D - Financial information (2/9)



If **any** of the following applies to the charity, complete Schedule 6 instead of Section D:


Based on the criteria below, select one of the following:

- a) The charity's revenue exceeded \$100,000.
 - b) The amount of all property (for example, investments, rental properties) not used in charitable activities was more than \$25,000.
 - c) The charity had permission to accumulate funds during this fiscal period.
- ☐ None of the above applies to the charity. We will complete Section D
- ☐ One or more of the above applies to the charity. We will complete Schedule 6

Next

Section D - Financial information (3/9)

Question D1

4020 Was the financial information reported below prepared on an accrual or cash basis? 

- ☐ Accrual
- ☐ Cash


Accrual: This method records revenue in the fiscal period the charity earned it in, and records expenditures in the fiscal period the charity incurred it in.

Cash: This method records only revenue or expenditures the charity received or paid during the fiscal period.

Section D - Financial information (4/9)

Question D3

Revenue

4490 Did the charity issue tax receipts for gifts? 

☒ Yes


☐ No

4500 Total eligible amount of all gifts for which the charity issued tax receipts 

CAN \$

.00

Section D - Financial information (5/9)

 **4530** Total other gifts received for which a tax receipt was NOT issued by the charity (excluding amounts at lines 4575 and 4630) ?

CAN \$.00


4565 Did the charity receive any revenue from any level of government in Canada? ?

☐ Yes

☐ No

4571 Total tax-receipted revenue from all sources outside of Canada (government and non-government) ?

CAN \$.00

 **4575** Total NON tax-receipted revenue from all sources outside of Canada (government and non-government) ?

CAN \$.00

 **4630** Total NON tax-receipted revenue from fundraising ?

CAN \$.00

Section D - Financial information (6/9)

4630 Total NON tax-receipted revenue from fundraising ?

CAN \$.00
--------	--	-----

- Revenue your charity did **not** issue a receipt for
- Enter the **gross** amount

Section D - Financial information (7/9)

5000 (a) Total expenditures on charitable activities ?

CAN \$

.00

5010 (b) Total expenditures on management and administration ?

CAN \$

.00

Section D - Financial information (8/9)

Expenditures on charitable activities include:

- costs for running the charity's day-to-day programs
- occupancy costs
- most salaries
- education and training for staff and volunteers

Do not include management, administration, or fundraising

Section D - Financial information (9/9)



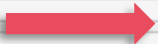

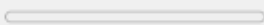
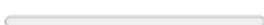
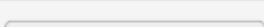



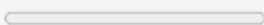
Management and administration expenses include costs related to:

- holding meetings of the board of directors
- accounting, auditing, personnel, and other administrative services
- buying supplies and equipment, and paying occupancy costs for administrative offices
- applying for grants or other types of funding



Completing schedules

Schedules

Schedule 1 - Foundations 		Not required	Start
Schedule 2 - Activities outside Canada		Not required	Start
Schedule 3 - Compensation		Not required	Start
Schedule 4 - Confidential data		Not required	Start
Schedule 5 - Non-cash gifts		Not required	Start
Schedule 6 - Detailed financial information		Not required	Start
Form T1236 - Qualified donees worksheet / Amounts provided to other organizations		Not Started	Start
Form T1441 - Qualifying disbursements: grants to non-qualified donees (grantees)		Not required	Start
Form T2081 - Excess corporate holding worksheet for private foundations		Not required	Start
Section E and F - Certification, confidential data, attachments, and submit		Not Started	Start

Schedule 1 - Foundations

Question 4

130 Did the foundation own more than 2% of any class of shares of a corporation at any time during the fiscal period? 

☒ Yes

☐ No

You **must** complete Form T2081, Excess Corporate Holdings Worksheet. Form T2081 is now available to you on the Overview page.

Schedule 2 – Activities outside Canada (1/4)


Question 1

200 Total expenditures on activities/programs/projects carried on outside Canada, excluding gifts to qualified donees. 

CAN \$

.00

Question 2

210 Were any of the charity's financial resources spent on programs outside of Canada under any kind of an arrangement including a contract, agency agreement, or joint venture to any other individual or organization (excluding gifts to qualified donees)? 

☐ Yes

☐ No

Next

Schedule 2 – Activities outside Canada (2/4)

Question 3

In the table below, enter the countries outside Canada where the charity itself carried on programs or devoted any of its resources.

Enter each country one at a time. ?

List of countries

Country
No data is available in the table

Add a country

Country

Select ▼

Previous

Next

Schedule 2 – Activities outside Canada (3/4)

List of amount(s) transferred to individuals/organizations

Name of individual/organization	Country where the activities were carried out	Amount (CAN\$)
No data is available in the table		

Add an individual or organization

Name of individual/organization

(Maximum 175 characters)

Country where the activities were carried out

Select▼

Amount transferred

CAN \$

.00

Previous

Next

Schedule 2 – Activities outside Canada (4/4)

Question 4

220 Were any projects undertaken outside Canada funded by Global Affairs Canada? 

☒ Yes

☐ No

230 What was the total amount the charity spent under this arrangement? 

CAN \$.00
--------	--	-----

Schedule 3 – Compensation

b) For the ten (10) highest compensated, permanent, full-time positions enter the number of positions that are within each of the following annual compensation categories. ?

Compensation range(CAN\$)	Line number	Number of employees
\$1 to \$39,999	305	(Maximum 2 digits) <input type="text" value="2"/>
\$40,000 to \$79,999	310	(Maximum 2 digits) <input type="text" value="4"/>
\$80,000 to \$119,999	315	(Maximum 2 digits) <input type="text"/>
\$120,000 to \$159,999	320	(Maximum 2 digits) <input type="text"/>
\$160,000 to \$199,999	325	(Maximum 2 digits) <input type="text"/>
\$200,000 to \$249,999	330	(Maximum 2 digits) <input type="text"/>
\$250,000 to \$299,999	335	(Maximum 2 digits) <input type="text"/>
\$300,000 to \$349,999	340	(Maximum 2 digits) <input type="text"/>
\$350,000 and over	345	(Maximum 2 digits) <input type="text"/>

Schedule 4 – Confidential data (1/2)

List of information about external fundraisers

Name (confidential)	At arm's length? (confidential)
No data is available in the table	

Add an external fundraiser

Name of the external fundraiser (confidential) ?

(Maximum 175 characters)

Was this external fundraiser at arm's length? (confidential) ?

☐ Yes

☐ No

Schedule 4 – Confidential data (2/2)

List of gifts received from donors not resident in Canada

Name (confidential)	Type of donor (confidential)	Value (CAN\$) (confidential)
No data is available in the table		

Add a gift of any kind received from a donor not resident in Canada

Name (confidential)

(Maximum 175 characters)

Type (confidential)

- ☐ Organization
- ☐ Government
- ☐ Individual

Value (confidential)

CAN \$

.00

Previous

Next

Schedule 5 – Non-cash gifts

Question 1

Select all types of non-cash gifts received for which a tax receipt was issued 

- ☐ 500 Artwork/wine/jewellery
- ☐ 505 Building materials
- ☐ 510 Clothing/furniture/food
- ☐ 515 Vehicles
- ☐ 520 Cultural properties
- ☐ 525 Ecological properties
- ☐ 530 Life Insurance policies
- ☐ 535 Medical equipment/supplies
- ☐ 540 Privately-held securities
- ☐ 545 Machinery/equipment/computers/software
- ☐ 550 Publicly traded securities/commodities/mutual funds
- ☐ 555 Books
- ☒ 560 Other

565 Specify other non-cash gifts

(Maximum 175 characters)

Question 2

580 Enter the total amount of tax-receipted non-cash gifts

CAN \$.00

Next

Schedule 6 – Detailed financial information (1/3)

Complete if any of the following apply:

- The charity's gross revenue is more than \$100,000
- The amount of all property not used in charitable activities or administration was more than \$25,000
- The charity had permission to accumulate property during this fiscal period

Schedule 6 – Detailed financial information (2/3)

Provide the following information:


- Assets and liabilities
- Revenue
- Expenditures
- Permission to accumulate property
- Permission to reduce disbursement quota
- Property not used in charitable activities

[T4033 Completing the Registered Charity Information Return - Canada.ca](#)

Schedule 6 – Detailed financial information

(3/3)

Liabilities



Description of liabilities	Amount (CAN\$)	
Accounts payable and accrued liabilities ?	4300	\$ <input type="text" value=""/> .00
Deferred revenue ?	4310	\$ <input type="text" value=""/> .00
Amounts owing to non-arm's length persons ?	4320	\$ <input type="text" value=""/> .00
Other liabilities ?	4330	\$ <input type="text" value=""/> .00
Total liabilities (add lines 4300 to 4330)	4350	\$ <input type="text" value=""/> 

Calculate

Form T1236 – Qualified donees (1/2)

You told us in Section C3, line 2000, that you made gifts or transferred funds to qualified donees or other organizations. Choose the option that you will use to provide the details for each of these qualified donees/other organizations.

Choose one of the following options:

- ☒ I will enter the names of the qualified donees into this form (choose this option if you have 25 or fewer qualified donees). 
- ☐ I will upload a document listing the qualified donees and all the required information prior to submitting this annual return. 

Your uploaded document must include the same information found on [Form T1236, Qualified donees worksheet/Amounts provided to other organizations](#):



If you choose to upload a document, there will be a delay in viewing the qualified donee information on the List of Charities website until the CRA processes the list. Also, no amendments to the annual return can be made during this processing time.

Next

Form T1236 – Qualified donees (2/2)

Add an organization to which the charity made gifts

Name of organization

(Maximum 60 characters)

(Enter the full name of the organization that received a gift from the charity.)

Associated charity ?

☐ Yes

☐ No

BN/Registration number

(Maximum 15 characters)

(9 digits, 2 letters, 4 digits. Example: "123456789RR0001")

City ?

(Maximum 30 characters)

Province/Territory

(Maximum 30 characters)

Amounts of non-cash gifts ?

CAN \$	<input type="text"/>	.00
--------	----------------------	-----

Total amount of gifts ?

CAN \$	<input type="text"/>	.00
--------	----------------------	-----

Form T1441 – Qualifying disbursements: grants to non-qualified donees (grantees) – How to report grants

Name: CLIENT NAME FOR 891828444
BN/Registration number: 891828444 RR 0013
Fiscal period: January 01, 2022 to December 31, 2022

You told us in Section C16, line 5841, that you made qualifying disbursements to non-qualified donees (grantees) **at any time from January 01, 2022 to December 31, 2022**. Choose the option that you will use to provide the details for each of these qualifying disbursements to grantees.

Choose one of the following options:

- ☐ I will enter the names of the grantees into this form (choose this option if you have 25 or fewer grantees that received grants totalling more than \$5,000 in the fiscal year).
- ☐ I will upload a document listing the grantees and all the required information prior to submitting this annual return (choose this option if you have 26 or more grantees that received grants totalling more than \$5,000 in the fiscal year).

Next

[Return to overview page](#)

Form T1441 – Qualifying disbursements: grants to non-qualified donees (grantees) – Total number of grantees

Name: CLIENT NAME FOR 891828444
BN/Registration number: 891828444 RR 0013
Fiscal period: January 01, 2022 to December 31, 2022

Registered charities may make qualifying disbursements by way of grants to non-qualified donees (grantees). Enter the required information for the qualifying disbursements.

Total number of grantees to which the charity made grants totalling more than \$5,000 in the fiscal period.

(Maximum 5 digits)

Previous

Next

[Return to overview page](#)

Form T1441 – Qualifying disbursements: grants to non-qualified donees (grantees) – Report each grant (1/2)

Name: CLIENT NAME FOR 891828444
BN/Registration number: 891828444 RR 0013
Fiscal period: January 01, 2022 to December 31, 2022

Registered charities may make qualifying disbursements by way of grants to non-qualified donees (grantees). Enter the required information for the qualifying disbursements.

List of grants made to non-qualified donees ?

Form T1441 – Qualifying disbursements: grants to non-qualified donees (grantees) – Report each grant (2/2)

Name of grantee	Purpose of grant	Amount of cash disbursement	Amount of non-cash disbursement	If outside Canada, each country code and country where the activities were carried on
No data is available in the table				

Add a grantee

Name of grantee

(Maximum 60 characters)

(Enter the full name of the grantee that received a grant from the charity.)

Purpose of grant ?

(Maximum 1000 characters, 1000 characters remaining)

Amount of cash disbursement ?

Amount of non-cash disbursement ?

If outside Canada, each country code and country where the activities were carried on ?

(Maximum 100 characters)

Previous

Next

[Return to overview page](#)

Form T2081 – Excess corporate holdings


List of corporations and class of shares

Select	Name of the corporation	Class of shares	Total number of issued and outstanding shares in this class	Fair market value per share at end of fiscal period (CAN\$)	Class of shares listed on a designated stock exchange	Holdings of the foundation on March 18, 2007(%)	Holdings of relevant person(s) with a material interest on March 18, 2007(%)	Exempt shares %	Holdings of the foundation at the end of the fiscal period (%)	Holdings of relevant person(s) with a material interest at the end of the fiscal period (%)	Exempt shares at the end of the fiscal period (%)
No data is available in the table											

To add a corporation or class of shares, select "Add".

Add

Sections E and F – Certification and confidential data

Schedule 1 - Foundations	<input type="text"/>	Not required	Start
Schedule 2 - Activities outside Canada	<input type="text"/>	Not required	Start
Schedule 3 - Compensation	<input type="text"/>	Not required	Start
Schedule 4 - Confidential data	<input type="text"/>	Not required	Start
Schedule 5 - Non-cash gifts	<input type="text"/>	Not required	Start
Schedule 6 - Detailed financial information	<input type="text"/>	Not required	Start
Form T1236 - Qualified donees worksheet / Amounts provided to other organizations	<input type="text"/>	Not Started	Start
Form T1441 - Qualifying disbursements: grants to non-qualified donees (grantees)	<input type="text"/>	Not required	Start
Form T2081 - Excess corporate holding worksheet for private foundations	<input type="text"/>	Not required	Start
Section E and F - Certification, confidential data, attachments, and submit 	<input type="text"/>	Not Started	Start

Section E – Certification (1/2)

Section E: Certification

This return must be certified by a person who has authority to sign on behalf of the charity. **It is a serious offence under the Income Tax Act to provide false or deceptive information.** ?

I certify that the information given on this annual return and any attachment is, to the best of my knowledge, correct, complete, and current.

Section F: Confidential data

Attachment



A charity's complete annual information return includes a copy of the charity's financial statement. If a financial statement is not included, your charity's registered status may be revoked.



Do not include an attachment that is not the charity's financial statement or its listing of qualified donee/other organizations. All correspondence and requests for changes to the charity's records must be submitted separately from this annual information return. For more information, refer to <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/making-changes.html>

Attach the charity's financial statement (the charity's treasurer should sign any financial statement that has not been professionally prepared).

Allowable file types: .pdf, .doc, .docx, .xls, .xlsx, .rtf, .txt, .jpg, .jpeg, .tiff, .tif, .xps

Maximum total file upload size is 150 MB.

*** Financial statement (required)** ?

No file chosen

Section E – Certification (2/2)

Optional attachment(s)

Your organization can add up to 11 additional attachments.

Allowable file types: .pdf, .doc, .docx, .xls, .xlsx, .rtf, .txt, .jpg, .jpeg, .tiff, .tif, .xps

Maximum total file upload size per document is 150 MB.

Attachment #1

Description

(Maximum 125 characters)

File

No file chosen

Submit the charity's annual return

Once you select "Submit the charity's annual return", you will receive a CRA case number and will have the option to print a summary of this return for your records.

☐ * I confirm that the return is ready to be submitted (*required*)

Submit the charity's annual return

T3010 Registered Charity Information Return

Confirmation


Successful submission

Name: **ACCOUNT NAME FOR 123456789 RR 0001**

BN/Registration
number: **123456789RR0001**

Fiscal period: **April 01, 2018 to March 31, 2019**

Your return was successfully submitted.

To view or print a summary of your return, go to the [Summary Overview page](#) 

Date and time submitted: 2019-05-06 at 13:06:17

Case Number: CH123456789012

Retain your case number for future reference.

[Print confirmation page](#) 



Upcoming changes to the T3010

Disbursement quota (DQ) rules for charities

Changes to the disbursement quota rules for charities in effect as of January 1, 2023:

- For property equal to or less than \$1 million, the DQ rate remains at 3.5%. On the portion of property exceeding \$1 million, the DQ rate increases to 5%.
- The CRA has discretion to grant a reduction in a charity's DQ obligation for any particular tax year.
- The CRA is no longer accepting requests to accumulate property.

Changes to the T3010

How charities will file Form T3010, Registered Charity Information Return:

- In January 2024, version 24 of Form T3010 will be released. Version 24 will include a schedule to help charities calculate their disbursement quota for the fiscal period, as well as new questions on donor advised funds, restricted funds, and investments.
- Charities will need to use specific versions of the T3010, depending on when their fiscal period ends. Beginning on January 1, 2024:
 - Charities with a fiscal period ending **on or before December 30 2023**, must file using version 23a.
 - Charities with a fiscal period ending **on or after December 31 2023**, must file their T3010 using version 24. If a charity sends us the wrong form, we will **not accept the** return for filing, and we will send them a notice. If we do not receive the correct form, we may proceed to revoke the charity's registered status.

Where to find this information

[T4033 Completing the Registered Charity
Information Return - Canada.ca](#)

Links Summary

- [T4033 Completing the Registered Charity Information Return - Canada.ca](#)
- [Consequences of Revocation](#)
- [Voluntary Revocation](#)
- [Form T1240, Registered Charity Adjustment Request](#)
- [My Business Account for charities - Canada.ca](#)
- [CRA sign-in services - Canada.ca](#)
- [Instruction on Changing director - Canada.ca](#)

Where to find this information

[Charities and giving – A to Z index](#)

(accessed from landing page at canada.ca/charities-giving)

Charities and giving – A to Z index

Filter items

Books

Showing 1 to 4 of 4 entries (filtered from 408 total entries) | Show entries

Topic	Keywords
Books and records	governing documents, source documents, retention periods
Books and records for registered journalism organizations	governing documents, source documents, retention periods, RJO
Keeping adequate books and records (checklist)	
Non-compliance issues	audit, tax shelter, gifting arrangement, receipt, registration number, books, records, abuse

Contact us

Charities Directorate

1-800-267-2384

Charities and giving
Electronic mailing list