



## Application to Register a Charity Under the *Income Tax Act*

To complete this form, you will need the information and instructions in the companion Guide T4063, *Registering a Charity for Income Tax Purposes*, available in the **Forms and publications** section on our website at [canada.ca/charities-giving](http://canada.ca/charities-giving).

To evaluate an application, we need complete and accurate information. If a question is not relevant to the organization's situation, enter N/A in the space provided. If this application and the mandatory attachments are not included, **we will return the application without reviewing it**. See the checklist on the last page for a list of the mandatory attachments.

The Canada Revenue Agency (CRA) may share the information collected on this form with other government departments or agencies to verify compliance with the *Income Tax Act* and other Acts of Parliament.

### Part 1 – Identification of the organization applying for registration

<b>Q1</b>	Current legal name of the organization									
<b>Q2</b>	Current operating or trade name	<input type="checkbox"/> N/A								
<b>Q3</b>	Previous names – List any other names under which the organization has operated	<input type="checkbox"/> N/A								
<b>Q4</b>	<b>Business Number</b> Give one of the organization's Business Numbers if one has been assigned.	<input type="checkbox"/> N/A								
	<table style="width: 100%; border: none;"> <tr> <td style="border: 1px solid black; width: 25%; height: 15px;"></td> <td style="border: 1px solid black; width: 25%; height: 15px;"></td> <td style="border: 1px solid black; width: 25%; height: 15px;"></td> <td style="border: 1px solid black; width: 25%; height: 15px;"></td> </tr> <tr> <td style="border: 1px solid black; width: 25%; height: 15px;"></td> <td style="border: 1px solid black; width: 25%; height: 15px;"></td> <td style="border: 1px solid black; width: 25%; height: 15px;"></td> <td style="border: 1px solid black; width: 25%; height: 15px;"></td> </tr> </table>									
<b>Q5</b>	<b>Mailing address</b>									
	_____ (number, street, room, floor or suite no., R.R.)									
	_____ (city or town)	_____ (province) <span style="float: right;"> _ _ _ _ _ _ _  (postal code)</span>								
	_____ (telephone number)	_____ (fax number) <span style="float: right;">_____ (website address)</span>								
<b>Q6</b>	<b>Previous contact with CRA</b>									
	Has the organization previously applied to be registered as a charity?									
	<input type="checkbox"/> Yes	<input type="checkbox"/> No								
	If <b>yes</b> , provide the reference number(s) used by the Charities Directorate. _____									

<b>Do not use this area</b>	
Business Number	Reference number
Submission Number	CTS Work Item Number



## Part 2 – Organizational structure (cont'd)

### Q10 Designation

- a) Has the organization been formed to give more than 50% of its income to qualified donees (e.g., other Canadian registered charities)?  
 Yes  No
- b) What percentage of the organization's officials listed in Q18 are **not at arm's length** with the other officials (e.g., **related** by blood, marriage, business or employer/employee relationships)?  
 50% or more are not at arm's length  
 less than 50% are not at arm's length

In the case of 50% or more, identify the relationships that exist among the organization's officials.

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- c) Has the organization received, or will it receive, more than 50% of its capital (e.g., funds or assets) from one person (i.e., individual, corporation, trust, unincorporated entity) or a group of persons who are **not at arm's length** with each other?  
 Yes (Go to Q10 d))  No (Go to Q11)
- d) 1. Identify the source of the funds or assets described in (c) and, if applicable, the relationships between the major contributors. See "Q10 Designation" in Guide T4063 for a definition of major contributor.

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- d) 2. Will the major contributor(s), or anyone not at arm's length with the major contributor(s), have any ongoing involvement whatsoever with the organization? If **yes**, describe.

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- d) 3. Identify any personal or business relationships that exist between the organization's officials (e.g., directors/trustees) and the major contributor(s) or any person not at arm's length with the major contributor(s).

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## Part 3 – Activities of the organization

### Q11 Charitable purposes and activities

- a) This section should be used to describe the organization's purpose(s) as outlined in its governing documents, and its corresponding activities (both actual and proposed). The purposes should be entered exactly as they appear in the organization's governing documents. Enter where each activity will take place, what it will involve, and who will carry it out, following the example set out below. **Provide information on pages 4 and 5.** (Purpose 1, 2, 3, etc.). If the activities will be carried on outside Canada, also see Q11 c). Record fundraising activities only at Q12.

**Example:**

**Purpose** – To relieve poverty by operating a soup kitchen.

**Activities in support of Purpose** – The organization will operate a soup kitchen at 555 Any Street, Any Place, Canada. We will offer breakfast, lunch, and dinner 365 days a year. The facility is staffed by 4 volunteers and also provides clothing and other basic necessities to those in need. The soup kitchen's services are advertised at local churches and community centres.





### Part 3 – Activities of the organization (cont'd)

b) Is the organization currently carrying out any of the activities described in Q11 a)?

Yes  No

If **no**, when does the organization plan to begin operations?

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c) **Activities outside of Canada**

Are any of the organization's activities listed in Q11 a) taking place outside of Canada?

Yes  No

If **yes**, go to pages 7 and 8, give the location(s) and include a detailed description of how the organization will undertake these activities. If these activities will be conducted under an arrangement with another organization or individual, describe the arrangement, and attach copies of any current or proposed written arrangement. See "Q11 c) Activities Outside of Canada" in Part 3 – Activities of the organization in Guide T4063 for more information.

d) **Attach all minutes of** meetings, newspaper articles, videos, CDs, fundraising materials, pamphlets, brochures, or other items that further describe the organization's work and purposes.

Attached  N/A

#### Q12 Fundraising activities

a) Describe the organization's fundraising activities. Include the fundraising method, the frequency of each event, and the percentage of people involved who are volunteers.

**Examples:**

1. We will operate a silent auction 4 times per year. 95% of people involved are volunteers.
2. We will use the Internet and email solicitation as means of ongoing fundraising. No volunteers are involved in this activity.

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b) Has the organization hired, or does it plan to hire, a fundraiser from outside the organization to carry out the fundraising activities?

Yes  No

If **yes**, identify the fundraiser, the amount it will be compensated, the terms of payment (for example, lump sum vs. percentage of gross revenue), and attach a copy of any current or proposed contracts.

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c) Does the organization intend to receive non-cash gifts on a regular basis?

Yes  No

If **yes**, describe the nature of the non-cash gifts (for example, art work).

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d) Is the organization currently involved with, or have any plans to become involved with, or is in any way associated with a tax shelter arrangement? See "Q12 d) Fundraising Activities" in Part 3 – Activities of the organization, in Guide T4063, for a definition of a "tax shelter arrangement".

Yes  No

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### Part 3 – Activities of the organization (cont'd)

#### Q13 Revenue from the sale of goods, services, or use of assets

Does the organization plan to charge fees or receive regular income from the sale of goods or services, or from the use of the organization's assets?

**Example:** The organization is an art gallery that operates a coffee shop in the facility for visitors to use.

Yes  No (Go to Q14)

If **yes**:

a) Describe the activities in detail, and explain how these activities are linked to the organization's purpose(s).

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b) For each of the activities described in Q13 a), give the approximate percentage of the organization's total resources (human, financial, and physical) that it will devote to these activities.

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c) What percentage of human resources involved are volunteers? \_\_\_\_\_

#### Q14 Political activities

See Part 3 – Activities of the Organization Q14 "Political activities" in Guide T4063 for a definition of political activities.

a) Does the organization intend to undertake any political activities? Letter-writing campaigns, public rallies, and advocacy are usually considered political in nature.

Yes  No (Go to Q15)

b) If **yes**, describe the political activities in detail. Include details about the frequency, and explain how these activities help to achieve the organization's purposes.

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c) For each of the activities described in Q14 b), give the approximate percentage of the organization's total resources (human, financial, and physical) that it will devote to its political activities.

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#### Q15 Financial transactions with the organization's officials

Has the organization entered into, or does it intend to enter into, any financial, real estate, or other transactions with its officials (e.g. directors/trustees), founders, members, employees, or any person/organization related to these people?

Yes  No

If **yes**, give a detailed description of these transactions.

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#### Q16 Ownership

a) Does the organization own more than 2% of the outstanding shares of any class of shares of a corporation? See Part 3 – Activities of the organization, in Guide T4063, at Q16, for an explanation of the terms used.

Yes  No

b) Does the organization currently own any real property, or does it have any future plans to own real property (e.g., land or buildings)?

Yes  No

If **yes**, on a separate page, provide the address (including the country) and a description of the current property and title-holder arrangements, and/or proposed title-holder arrangements for future property.

## Part 4 – Financial Information of the organization

### Q17 Proposed budget

All applicants must complete Part 4. Give a proposed operating budget of revenue and expenditures and a list of anticipated assets and liabilities for the organization.

If the organization has been operating for more than one year, attach a copy of its most recent financial statements.

Attached       N/A      \_\_\_\_\_ Month \_\_\_\_\_ Day

What is the organization's fiscal period end? \_\_\_\_\_

### Proposed operating budget for the next fiscal period (covering 12-months)

#### a) Revenue

Gifts	Amount
Gifts from individuals	001 _____
Gifts from corporations and businesses (give name if known)	002 _____
_____	
_____	
_____	
_____	
Gifts from other registered charities (give name and Business Number if known)	003 _____
_____	
_____	
_____	
<b>Government grants, contributions, or contracts</b>	<b>004</b> _____
<b>Fundraising activities (described in Q12)</b>	
Fundraising activities carried on by the organization itself (report gross revenue)	005 _____
Fundraising carried on by fundraisers outside of the organization (report gross revenue)	006 _____
<b>Revenue from the sale of goods, services, or the use of assets (described in Q13)</b>	<b>007</b> _____
<b>Other</b>	
List any other sources of revenue not already included above	008 _____
_____	
_____	
_____	
<b>Total estimated revenue from all sources</b> (Add lines 001-008)	<b>009</b> _____

## Part 4 – Financial Information of the organization (cont'd)

## b) Expenditures

## Charitable activities (described in Q11)

Amount

List **each** charitable activity (described in Q11a) and c))

010 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Gifts to qualified donees (e.g., Canadian registered charities)  
Include the name and Business Number of the qualified donee

011 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Fundraising activities (described in Q12)

Expenditures incurred for fundraising carried on by the organization itself

012 \_\_\_\_\_

Expenditures incurred for paying fundraisers outside of the organization

013 \_\_\_\_\_

Expenditures related to the sale of goods, services, or the use of assets  
(described in Q13)

014 \_\_\_\_\_

## Expenditures incurred for political activities (described in Q14)

015 \_\_\_\_\_

## Management and administration

Remuneration (e.g., salaries, benefits) not already included

016 \_\_\_\_\_

Accounting and legal services

017 \_\_\_\_\_

Occupancy costs not already included

018 \_\_\_\_\_

Supplies and equipment not already included

019 \_\_\_\_\_

Printing, publications, and advertising not already included

020 \_\_\_\_\_

Travel not already included

021 \_\_\_\_\_

## Other

List any other expenditure not already included above

022 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Total estimated expenditures

(Add lines 010 to 022)

023 \_\_\_\_\_

**Part 4 – Financial Information of the organization (cont'd)**

**c) Revenue and expenditures outside of Canada**

**Revenue**

Is any of the organization's estimated revenue included in Q17 a) received from donors outside of Canada?

Yes                       No

If **yes**, list the source of revenue and total estimated amount.

Source of revenue	Amount
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Expenditures**

Will any of the organization's estimated expenditures included in Q17 b) be incurred for activities outside of Canada?

Yes                       No

If **yes**, list the country, corresponding activity (described in Q11 a) & Q11 c)) and the estimated amount.

Country (including region)	Activity/Recipient	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**d) Assets and Liabilities**

**Revenue**

See Q17 d) "Assets and Liabilities" in Part 4 – Financial information of the organization in Guide T4063 for more information.

**Assets**

*Enter the cost of the asset or, if the asset was donated, enter the fair market value.*

Cash, bank accounts, and short term investments

**030** \_\_\_\_\_

Long-term investments

**031** \_\_\_\_\_

Capital assets (e.g., equipment, buildings)  
Specify:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**032** \_\_\_\_\_

**Total assets**

(Add lines 030-032)

**033** \_\_\_\_\_

**Liabilities**

Amounts payable (e.g., accounts payable, mortgages, loans)

Specify:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Total liabilities**

**034** \_\_\_\_\_

### Part 5 – Information about the organization's officials

**Q18** Your organization is required to provide certain information about all members of its board of directors/trustees. Only the **public information** section is available to the public. The **confidential information** section is for the CRA's use and may only be disclosed in accordance with the provisions of the *Income Tax Act*. If more space is required, photocopy this page and attach it to the application form.

Public information			Confidential information		
Last name	First name	Initial	Street number and name	City	
Position in charity <input type="checkbox"/> President <input type="checkbox"/> Secretary <input type="checkbox"/> Vice-President <input type="checkbox"/> Treasurer <input type="checkbox"/> Chair <input type="checkbox"/> Executive Director <input type="checkbox"/> Other _____			Province or territory	Postal code	Telephone number
			Occupation/line of work	Date of birth (YYYY/MM/DD)	
Last name	First name	Initial	Street number and name	City	
Position in charity <input type="checkbox"/> President <input type="checkbox"/> Secretary <input type="checkbox"/> Vice-President <input type="checkbox"/> Treasurer <input type="checkbox"/> Chair <input type="checkbox"/> Executive Director <input type="checkbox"/> Other _____			Province or territory	Postal code	Telephone number
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Position in charity <input type="checkbox"/> President <input type="checkbox"/> Secretary <input type="checkbox"/> Vice-President <input type="checkbox"/> Treasurer <input type="checkbox"/> Chair <input type="checkbox"/> Executive Director <input type="checkbox"/> Other _____			Province or territory	Postal code	Telephone number
			Occupation/line of work	Date of birth (YYYY/MM/DD)	
Last name	First name	Initial	Street number and name	City	
Position in charity <input type="checkbox"/> President <input type="checkbox"/> Secretary <input type="checkbox"/> Vice-President <input type="checkbox"/> Treasurer <input type="checkbox"/> Chair <input type="checkbox"/> Executive Director <input type="checkbox"/> Other _____			Province or territory	Postal code	Telephone number
			Occupation/line of work	Date of birth (YYYY/MM/DD)	
Last name	First name	Initial	Street number and name	City	
Position in charity <input type="checkbox"/> President <input type="checkbox"/> Secretary <input type="checkbox"/> Vice-President <input type="checkbox"/> Treasurer <input type="checkbox"/> Chair <input type="checkbox"/> Executive Director <input type="checkbox"/> Other _____			Province or territory	Postal code	Telephone number
			Occupation/line of work	Date of birth (YYYY/MM/DD)	
Last name	First name	Initial	Street number and name	City	
Position in charity <input type="checkbox"/> President <input type="checkbox"/> Secretary <input type="checkbox"/> Vice-President <input type="checkbox"/> Treasurer <input type="checkbox"/> Chair <input type="checkbox"/> Executive Director <input type="checkbox"/> Other _____			Province or territory	Postal code	Telephone number
			Occupation/line of work	Date of birth (YYYY/MM/DD)	
Last name	First name	Initial	Street number and name	City	
Position in charity <input type="checkbox"/> President <input type="checkbox"/> Secretary <input type="checkbox"/> Vice-President <input type="checkbox"/> Treasurer <input type="checkbox"/> Chair <input type="checkbox"/> Executive Director <input type="checkbox"/> Other _____			Province or territory	Postal code	Telephone number
			Occupation/line of work	Date of birth (YYYY/MM/DD)	

## Part 6 – Confidential Information

### Q19 Physical location of the organization

Same as mailing address (Q5) or:

\_\_\_\_\_  
(Number, street, room, floor or suite no., lot no., concession)

\_\_\_\_\_  
(City or town, province, and postal code)

\_\_\_\_\_  
(Telephone number)

\_\_\_\_\_  
(Fax number)

### Q20 Physical location of books and records

Same as mailing address (Q5) or:

Same as physical location in (Q19) or:

\_\_\_\_\_  
(Number, street, room, floor or suite no., lot no., concession)

\_\_\_\_\_  
(City or town, province, and postal code)

\_\_\_\_\_  
(Telephone number)

\_\_\_\_\_  
(Fax number)

### Q21 Authorized Representative / Contact Person

Name \_\_\_\_\_  
(first name, initial, surname)

Full mailing address

\_\_\_\_\_  
(Number, street, room, floor or suite no., lot no., concession)

\_\_\_\_\_  
(City or town, province, and postal code)

\_\_\_\_\_  
(Telephone number)

\_\_\_\_\_  
(Fax number)

## Part 7 – Final Steps and Certification

### Checklist

Have you attached the following information to this application?

- a copy of the governing documents and a copy of all the amendments, if applicable (see Q9.1). If the organization is governed by a constitution, remember to have the document signed and dated by three current directors (see Q9.2);
- a copy of the by-laws, if any (see Q9.1 or Q9.2);
- the parent organization's Letter of Good Standing;
- a certificate of good standing, if applicable (see Q9.1 c));
- a detailed description of each purpose and its corresponding activities (see Q11 a) & Q11 c));
- a copy of the minutes, newspaper clippings, pamphlets, fundraising materials (see Q11 d));
- a copy of the latest financial statements, if applicable (see Q17);
- the \$500 late-filing penalty, if applicable (see the Re-registration section on our webpages at [canada.ca/charities-registration](http://canada.ca/charities-registration)); and
- if applicable, all missing T3010, *Registered Charity Information Returns*, and required attachments (see the Re-registration section on our webpages at [canada.ca/charities-registration](http://canada.ca/charities-registration)).

**Part 7 – Final Steps and Certification (cont'd)****Certification**

**This form must be signed by two directors/trustees or like officials of the organization who have authority to sign on behalf of the organization. It is a serious offence under the *Income Tax Act* to provide false or deceptive information.**

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

Signature	1. _____	2. _____
Name (please print)	_____	_____
Position within the organization	_____	_____
Date signed	_____	_____

**Electronic mailing list**

Stay notified when important new information is added to the Charities and giving webpages (for example, a new guidance product or webinar) by going to [canada.ca/cra-email-lists](http://canada.ca/cra-email-lists) and subscribing to the Charities and giving – What's new mailing list. Your email address will remain confidential and will not be disclosed or used for any purpose other than the delivery of the Canada Revenue Agency information that you have requested.

The Charities Directorate will subscribe the following email addresses for the electronic mailing list service.

Give your preferred email addresses: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Once completed, mail this application to:**

**Charities Directorate  
 Canada Revenue Agency  
 Ottawa ON K1A 0L5**

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 and/or like officials and authorized representatives of the applicant 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 social insurance number (SIN), personal tax information, and relevant financial and biographical information, which may be used to assess the overall risk of registration with respect to the obligations of registration as outlined in the Act and the common law. The SIN is collected pursuant to subsection 237 of the Act and is used for identification purposes.

If the application is approved and the organization is registered, the CRA is permitted to make this form (including any attachments) and copies of the registration letter (including any conditions and warnings contained therein) available to the public, with the exception of the confidential information in Part 5 and Part 6. If registration is denied, the information will not be provided to the public. Personal information may also be disclosed to the applicant organization and/or its authorized representatives as well as other third parties pursuant to the disclosure provisions under Section 241 of the Act. Personal information may also be shared with other government departments and agencies under information-sharing agreements in accordance with the disclosure provisions under Section 241 of the Act. Incomplete or inaccurate information may result in the application being returned to the applicant, or may result in a refusal to register.

Information is described in Charities Program 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. Please be advised that 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 applicant to voluntarily inform directors and like officials that their personal information has been collected and disclosed to the CRA for the application process.

I confirm that I have read the Privacy statement above.