



T3 Pooled Registered Pension Plan Tax Return

Unless otherwise stated, each legislative reference in this return is to the Income Tax Act.

Complete this return 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.

After you complete the T3 PRP return, mail it to the Sudbury Tax Centre. You can find the address on page 2 of this return. You have the option to file this return over the internet.

Do not use this area.

Is this an amended return? Yes <input type="checkbox"/> 1 No <input type="checkbox"/> 2		Is this return a first year filing? Yes <input type="checkbox"/> 1 No <input type="checkbox"/> 2		Tax year of return <input type="text"/>		
Name of plan			Account number (if one has been assigned) T <input type="text"/>			
Province or territory of residence of the plan		Plan registration number		Your language of correspondence: English <input type="checkbox"/> French <input type="checkbox"/>		
Name of trustee or pension corporation filing this return			Telephone number			
Mailing address of trustee or pension corporation			Names of other trustees			
City	Province/Territory or State	Country				Postal or ZIP code
Address where trust or pension corporation keeps its books and records (if different from address above)						
City	Province/Territory or State	Country				Postal or ZIP code
Date the trust:	came into existence (effective date of registration)	<input type="text"/>	ceased to exist	<input type="text"/>		
				Date (YYYYMMDD)		
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.						
<input type="text"/>				<input type="text"/>		
Name of new trust, or insurance company				Date (YYYYMMDD)		

Summary of tax or refund

Tax payable under subsection 207.1(5) on agreements to acquire shares (from line 11 of Schedule 1 on the next page)	190		• 7
Minus: Payments on account	010	-	8
Balance owing or refund (line 7 minus line 8)	090	=	9
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 Form T3-DD, Direct Deposit Request for T3.

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 YYYYMMDD

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 different from the 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.

241

11

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 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 canada.ca/taxes.

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

How to file this return**By mail**

Sudbury Tax Centre
T3 Trust Returns Program
Canada Revenue Agency
1050 Notre Dame Avenue
Sudbury ON P3A 6C2

By internet

You have the option to send this return over the Internet in XML format using the Canada Revenue Agency's secure Internet File Transfer service. You will need a Web access code (WAC). For more information about this filing method, go to canada.ca/taxes-iref.