



# Partnership Financial Return

Complete this financial return using the instructions in guide T4068, Guide for the Partnership Information Return (T5013 Forms). You can file this return electronically without a web access code using the "File a return" service in My Business Account at [canada.ca/my-cra-business-account](http://canada.ca/my-cra-business-account) or, for authorized representatives, in Represent a Client at [canada.ca/taxes-representatives](http://canada.ca/taxes-representatives).

**Note:** All legislative references on this form refer to the Income Tax Act.

**055**  
**For internal use only**

<p><b>Identification</b></p> <p><b>Partnership account number:</b> 001 _____</p> <p><b>Partnership name:</b> 006 _____ 007 _____</p> <p><b>Partnership operating or trading name:</b> 008 _____ 009 _____</p> <p><b>Location of the partnership head office:</b> Has this location changed since the last time you filed a partnership information return? 010 <input type="checkbox"/> Yes <input type="checkbox"/> No If you answered <b>Yes</b> to line 010, enter the address of the new location on lines 011 to 018: 011 _____ 012 _____ City _____ Province/State _____ 015 _____ 016 _____ Country _____ Postal or zip code _____ 017 _____ 018 _____</p> <p><b>Mailing address of the partnership:</b> (if different from the head office address) Has this address changed since the last time you filed a partnership information return? 020 <input type="checkbox"/> Yes <input type="checkbox"/> No If you answered <b>Yes</b> to line 020, enter the new mailing address on lines 021 to 028: 021 c/o _____ 023 _____ 024 _____ 025 City _____ Province/State _____ Country _____ Postal or zip code _____ 027 _____ 028 _____</p> <p><b>Location of the partnership's books and records:</b> (if different from the head office address) Has this location changed since the last time you filed a partnership information return? 030 <input type="checkbox"/> Yes <input type="checkbox"/> No If you answered <b>Yes</b> to line 030, enter the address of the new location on lines 031 to 038: 031 _____ 032 _____ City _____ Province/State _____ 035 _____ 036 _____ Country _____ Postal or zip code _____ 037 _____ 038 _____</p>	<p>Is this an amended return? 040 <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>Fiscal period to which this information return applies:</b> 060 Fiscal period start _____ 061 Fiscal period-end * _____ From _____ To _____ * If you answered <b>Yes</b> to question 078 below, enter the date when the partnership ceased to exist.</p> <p><b>The end members of this partnership are</b> (tick the applicable boxes): 062 01 <input type="checkbox"/> Individuals (including trusts) 02 <input type="checkbox"/> Corporations</p> <p>Is this the first year of filing? 070 <input type="checkbox"/> Yes <input type="checkbox"/> No If you answered <b>Yes</b> to line 070, enter the date the partnership was created: 071 _____ Year _____ Month _____ Day _____</p> <p>Number of T5013 slips: 073 _____</p> <p>Is this the partnership's final information return up to dissolution? 078 <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If an election was made under section 261 by one or more partners, enter the functional currency code used for this return: 079 _____</p> <p>Was the partnership a Canadian partnership throughout the fiscal period? 082 <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>Type of partnership at the end of the fiscal period:</b></p> <table style="width:100%;"> <tr> <td style="width:50%; vertical-align: top;"> <p><b>086 Non tax shelter</b></p> <p><input type="checkbox"/> 01 General partnership</p> <p><input type="checkbox"/> 02 Limited partnership</p> <p><input type="checkbox"/> 03 Limited liability partnership</p> <p><input type="checkbox"/> 08 Investment club</p> </td> <td style="width:50%; vertical-align: top;"> <p><b>Tax shelter</b></p> <p><input type="checkbox"/> 11 General partnership</p> <p><input type="checkbox"/> 12 Limited partnership</p> <p><input type="checkbox"/> 13 Co-ownership</p> <p><input type="checkbox"/> 19 Other (specify below)</p> <p>_____</p> <p>_____</p> </td> </tr> </table> <p>If the partnership is a tax shelter (TS), enter the TS identification number: 087 TS _____</p>	<p><b>086 Non tax shelter</b></p> <p><input type="checkbox"/> 01 General partnership</p> <p><input type="checkbox"/> 02 Limited partnership</p> <p><input type="checkbox"/> 03 Limited liability partnership</p> <p><input type="checkbox"/> 08 Investment club</p>	<p><b>Tax shelter</b></p> <p><input type="checkbox"/> 11 General partnership</p> <p><input type="checkbox"/> 12 Limited partnership</p> <p><input type="checkbox"/> 13 Co-ownership</p> <p><input type="checkbox"/> 19 Other (specify below)</p> <p>_____</p> <p>_____</p>
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Partnership account number: 001 \_\_\_\_\_

Fiscal period-end

Year    Month    Day

\_\_\_\_\_ 061 \_\_\_\_\_

**Required documents to attach to this T5013 FIN, Partnership Financial Return**

1. Form T5013 SUM, Summary of Partnership Income, and a copy of each T5013, Statement of Partnership Income, issued to partners and nominees or agents
2. The General Index of Financial Information (GIFI) schedules; T5013SCH100, Balance Sheet Information; T5013SCH125, Income Statement Information; T5013SCH140, Summary Statement (when more than one schedule 125 is filed); and T5013SCH141, Financial Statement Notes Checklist, (not required for investment clubs)
3. Schedules: T5013SCH1, Net Income (Loss) for Income Tax Purposes; (If you are an inactive partnership, see line 280 in Guide T4068 for more information); and T5013SCH50, Partner's Ownership and Account Activity
4. For each **Yes** answer to the following questions, **attach** the related schedule or form to the partnership return, unless otherwise instructed

					<b>Schedule or form</b>
At any time during the fiscal period, was the partnership a member of another partnership (directly or indirectly through one or more partnerships)? .....	<b>150</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		9
Has the partnership had any transactions, including sections 97 and 98 transactions or subsection 85(2) transfers with its members or employees, other than transactions in the ordinary course of business? (Do not include non-arm's length transactions with non-residents.) .....	<b>162</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		T2058, T2059, or T2060
Did the partnership have a total amount over \$1 million of reportable transactions with non-arm's length non-residents? .....	<b>171</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		T106
Does the partnership have to file Form T1134 in respect of any foreign affiliates in the fiscal period? .....	<b>172</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		T1134
Has the partnership made any charitable donations, gifts of cultural or ecological property or federal, provincial, territorial or municipal political contributions? .....	<b>202</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		2
Does the partnership have a permanent establishment in more than one jurisdiction? .....	<b>205</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		5
Has the partnership realized any capital gains or incurred any capital losses during the fiscal period? .....	<b>206</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		6
Does the partnership have any property that is eligible for capital cost allowance? .....	<b>208</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		8
Does the partnership have any resource-related deductions (not including renounced expenditures)? .....	<b>212</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		12
Is the partnership allocating any investment tax credits (ITCs)? If <b>Yes</b> , attach a document to this return providing a detailed calculation of the partnership's ITCs and their allocation to one or more partners. ....	<b>231</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		Calculation and allocation
Did the partnership incur any scientific research and experimental development (SR&ED) expenditures? .....	<b>232</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		T661
Did the partnership allocate renounced resource expenses to its members? .....	<b>252</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		52
Did the partnership own or hold specified foreign property for which the total cost amount, at any time in the fiscal period, was more than CAN\$100,000? .....	<b>259</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		T1135
Is the partnership allocating any Canadian journalism labour tax credits? .....	<b>260</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No		58



