

T3 TAX RETURN ORGANIZER CANADIAN TRUST OR ESTATE
(FOR INTERNAL USE ONLY BY THE BRUNTON, STRACHAN & KHAN CPA FIRM, CHARTERED)

FOR TAX RETURN YEAR ENDED _____ CURRENT DATE _____

TO AVOID DELAY WITH YOUR RETURN PLEASE ANSWER ALL QUESTIONS AND PROVIDE COPIES OF NECESSARY DOCUMENTATION

PART I – GENERAL INFORMATION

1. Name of trust/estate _____ Trust Account Number _____
2. Address _____
Phones: Home _____ Office _____ Cell _____ Email _____
3. Residence of trust _____ Country of residence (if not Canada) _____
4. Estates: Decedent's domicile at the time of death _____ Date of death _____
5. If the entity is a trust, please forward us a copy of the trust document Done / NA _____
6. Name and address of individual to whom return is to be sent _____

7. Nature of the activities of the trust _____
8. Number of fiduciaries _____. Please attach a list of fiduciaries showing name, address, Canadian Social Insurance Number (if any), and country of residence, for each. Done / NA _____
9. Has the trust/estate ever filed a Canadian or U.S. tax return? Yes / No _____
Please attach a copy unless it was prepared by us. Done / NA _____

PART II – CURRENT YEAR TAX INFORMATION

- 10a. Did the trust/estate receive any rental income? Yes / No _____
- 10b. Did the trust/estate sell real estate during the year? Yes / No _____
If "Yes", please complete the separate organizer "Real Estate Organizer". Done / NA _____
11. Did the trust/estate receive any other income? Yes / No _____
If "Yes", please provide details, including payors and amounts, on a separate page. Done / NA _____
12. Did the trust/estate pay or have withheld any Canadian, U.S. federal or state income tax? Yes / No _____
If "Yes", please provide details, including payment dates and amounts, on a separate page. Done / NA _____
- 13a. If a trust, did it make any payments to beneficiaries of trust income during the year? Yes / No _____
- 13b. If a trust, did it distribute assets other than cash to beneficiaries during the year? Yes / No _____
If "Yes" to either, please provide details, including payment dates and amounts, on a separate page. Done / NA _____
14. Did the trust receive any property as a contribution during the year? Yes / No _____
If "Yes" to either, please provide details on a separate page. Done / NA _____
- 15a. Did the trust change beneficiaries during the year? Yes / No _____
- 15b. Did the trust change the ownership of capital or income interest during the year? Yes / No _____
If "Yes" to either, please provide details on a separate page. Done / NA _____
16. Did the trust/estate borrow money, or incur a debt, in a non-arm's length transaction during the year? Yes / No _____
If "Yes", please provide details on a separate page. Done / NA _____
17. Did the trust/estate hold shares in a Canadian private corporation during the year? Yes / No _____
If "Yes", please provide details of the corporation on a separate page. Done / NA _____
18. Did the trust/estate own or hold foreign (non-Canadian) property at any time in 2020 with a total cost of more than CDN \$100,000? (e.g. Non-Canadian trusts, non-Canadian corporations, non-Canadian bank and brokerage accounts, non-Canadian real estate) Yes / No _____
If "Yes", please also complete the T1135 organizer. Done / NA _____
19. **Have you answered all questions & supplied all documents requested on this questionnaire?** Yes / No _____
If "No", please explain, otherwise the tax return may be delayed and/or the fee may be increased because of the extra time required. _____

Signed: _____

PLEASE RETURN TO: THE BRUNTON, STRACHAN & KHAN CPA FIRM, CHARTERED

4710 NW BOCA RATON BLVD, #101, BOCA RATON, FL 33431

Tel: (561) 241-9991 Fax: (561) 241-6332 Email: tax@taxintl.cpa Website: www.taxintl.cpa

Please include a US \$1,500 retainer payable to "The Brunton, Strachan & Khan CPA Firm" with this organizer.

If you wish, retainers can be paid online with a credit card or eCheck. Please go to our website www.taxintl.cpa and scroll down to "Make Payment" on the lower right side or call our office to make a credit card payment over the phone.