

**T3 TAX RETURN ORGANIZER CANADIAN TRUST OR ESTATE**(FOR INTERNAL USE ONLY BY ABITOS, CPAs AND ADVISORS,  
FORMERLY KNOWN AS THE BRUNTON STRACHAN & KHAN CPA FIRM)**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 \_\_\_\_\_
- 1a. Phones: (U.S.): \_\_\_\_\_ (Non-U.S.): \_\_\_\_\_ Cell: \_\_\_\_\_ Office: \_\_\_\_\_
2. Address \_\_\_\_\_
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  
Please provide the 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 2022 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 \_\_\_\_\_

**If you have not answered all questions & supplied all documents requested on this organizer, please explain, otherwise your tax return may be delayed and/or the fee may be increased due to the extra time required.**

Signed: \_\_\_\_\_

PLEASE RETURN TO:

**ABITOS, CPAs AND ADVISORS**  
**327 PLAZA REAL, STE 235, BOCA RATON, FL 33432**

Tel: (561) 241-9991

Fax: (561) 826-9299

E-Mail: [bsk@abitos.com](mailto:bsk@abitos.com)Website: [www.abitos.com](http://www.abitos.com)**Please include a US \$1,500 retainer payable to "AbitOs, PLLC" with this organizer.****Please refer to the enclosed payment instructions.**