



Making sense of CRA's new online Canadian charity application system

By Mark Blumberg and Maddy Sawyer (July 28, 2019)

Judging on the number of lawyers and accountants who have called me over the last few weeks for help it appears that the new CRA online system is quite challenging for some. Professional advisors who have been doing charity applications for decades in some cases are having tremendous difficulty navigating the system. Some have even told me that with the one or two applications they do a year they will probably stop doing them because of the complexity and the amount of work needed.

Caution: the information in this article is up to date as of July 28, 2019 and changes are happening all the time so keep that in mind.

There are 2 challenges that we are seeing with new system:

- 1) how to get the necessary approvals and RR account to be able to login to the CRA MyBA system and even make the charity application. This will be dealt with in a separate article. Many groups are having trouble obtaining the RR account which is necessary for an electronic application.
- 2) Completing the online T2050 form as it actually asks for slightly different information than the previous T2050s which was a PDF form. Hopefully this article will be helpful in understanding the questions for a charity registration.

It is important to keeping in mind that applying for charity status is not a simple completion of a form but involves a number of complexities around factual and legal issues. The application form has many seemingly benign or simple questions are actually complicated and can create a problem

for a non-profit when it applies for charity status. You might find our article “Top 68 CRA Reasons for Denying your Canadian Registered Charity Application” helpful. As CRA cannot register an organization that is mostly a charity or 95% so consequently most applications are unsuccessful. It is a good idea to obtain legal advice if you can about a charity application.

To deal with this second challenge I have logged in to the Canadian Charity Law Association on the MyBA system. The Canadian Charity Law Association is a non-profit organization and it has no interest in becoming a charity but I’m just using it as an example if one day the director’s of the Association decided they wish to apply for charity status.

As well and perhaps more importantly at the end of this article we have attached a PDF of a complete T2050 that a group that I was not involved in the charity application received when CRA had returned their paper application. This T2050 (19) has all the questions on the online application – however, it is not clear whether one can use the T2050 form attached for an actual application as opposed to just for reference purposes. Note that the questions are not identical to the previous application form.

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This article is for information purposes only. It is not intended to be legal advice. You should not act or abstain from acting based upon such information without first consulting a legal professional.

When you are on the MyBA system here is the main page offering many choices. You only get to see the “Registered Charity” part if you have an RR account from CRA through the Business Registration Online (BRO) system.

The screenshot shows the My Business Account (MyBA) system interface. At the top, there is a browser tab labeled "My Business Account" and a URL: <https://apps1.ams-sga.cra-arc.gc.ca/gol-ged/mbsl/myba/prot/wcm.action>. The page header includes the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". Below this is the "Canada Revenue Agency" logo and a "Logout" button. The main navigation bar contains "My Business Account", "CANADIAN CHARITY LAW ASSOCIATION Business Profile", and "Submit documents".

The main content area is divided into a sidebar and a main panel. The sidebar, titled "My Business Account", contains the following links: Mail (with a red notification icon), Message Centre, Audit enquiries, Direct deposit transactions, Filing and balance confirmation, Open a non-resident tax account, Make Payments (highlighted), Pre-authorized debit, and My Payment.

The main panel is titled "Welcome MARK BLUMBERG" and includes a "Help with this page" link. Below the welcome message, there is a "Select a Business Number (BN)" dropdown menu set to "807985049" and an "Access BN" button. The main content is organized into two sections:

- CANADIAN CHARITY LAW ASSOCIATION**
 - Corporation Income Tax**
 - RC: 0001 (dropdown)
 - Links: Transmit a return, View return status, View return balances, Account balance and activities, View special elections and returns (SER), Register a formal dispute (Notice of Objection), Manage direct deposit, View direct deposit transactions, Manage address, Calculate instalment payments, Enquiries service, Manage language preference (New!), Request to close corporation income tax account (New!), Request a CPP/EI ruling, Request a CPP/EI refund.
 - Registered charity**
 - RR: 0001 (dropdown)
 - Links: View program account details, Apply to be a registered charity or RCAA, View application status, File a return, Adjust a return, View expected and filed returns, Update registered charity or RCAA information, Manage address, Manage language preference (New!), View program account name (New!).

At the bottom of the page, the following information is displayed:

Screen ID: MBA-08
Date modified: 2019-05-13

I have made below a bigger picture of the second block which is for a registered charity. Keep in mind that although it says registered charity this is not actually a registered charity but it is only an organization that has RR number which means it has a “pending” application. Pending means not applied for or applied for but not yet accepted. To apply for charity status you click on the second link “Apply to be a registered charity or RCAAAA”.

Registered charity

RR 0001 ▼

- [View program account details](#)
- [Apply to be a registered charity or RCAAAA](#)
- [View application status](#)
- [File a return](#)
- [Adjust a return](#)
- [View expected and filed returns](#)
- [Update registered charity or RCAAAA information](#)
- [Manage address](#)
- [Manage language preference](#) **New!**
- [View program account name](#) **New!**

Then you get a long privacy notice which is worth reading.



Apply to be a Registered Charity Under the Income Tax Act

Privacy notice

Program account number: 807985049RR0001
Name: CANADIAN CHARITY LAW ASSOCIATION
Registration status: Pending

Review the following privacy notice:

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, like officials, contacts for application purposes, 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 personal tax information, and relevant financial and biographical information. Personal information will be used to assess the risk of registration with respect to the obligations and requirements as outlined in the Act and the common law. The social insurance number (SIN) is collected under subsection 237 of the Act and is used for identification purposes.

If the application is approved and the organization is registered, the Canada Revenue Agency (CRA) is permitted to make certain information from the application (including any attachments) and copies of the registration letter (including any conditions and warnings contained therein) available to the public, with the exception of information marked as confidential. If registration is denied, the information will not be provided to the public. Personal information may also be disclosed to the applicant organization, contacts for application purposes and authorized representatives, as well as other government agencies and departments under information-sharing agreements, and in accordance with section 241 of the Act. Incomplete or inaccurate information may result in the Charities Directorate not processing the application, or may result in a refusal to register.


Personal information is described in personal information bank 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. 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 organization to voluntarily inform its directors and like officials that it has collected and disclosed their personal information to the CRA.

* I confirm that I have read the Privacy notice above. **(required)**

Next

After you have confirmed reading the privacy notice and click next then you get the following screen.

 Government of Canada / Gouvernement du Canada

Canada Revenue Agency Logout

[Home](#) → [My Business Account](#)

Apply to be a Registered Charity Under the Income Tax Act

Overview

Program account number: 807585049RR0001
Name: CANADIAN CHARITY LAW ASSOCIATION
Registration status: Pending

Review before you start

[Quiz - Should you apply for charitable registration?](#)
[Checklist to complete the application for registration](#)
[Privacy Notice](#)

Your progress

Section	Progress	Status	Action
Identification of your organization	<input type="checkbox"/>	Not started	Start
Previous application for registration	<input type="checkbox"/>	Not started	Start
Organizational structure	<input type="checkbox"/>	Not started	Start
Governing documents	<input type="checkbox"/>	Not started	Start
Directors, trustees, and like officials	<input type="checkbox"/>	Not started	Start
Designation	<input type="checkbox"/>	Not started	Start
Purposes and activities	<input type="checkbox"/>	Not started	Start
Gifts and other income generating activities	<input type="checkbox"/>	Not started	Start
Political activities	<input type="checkbox"/>	Not started	Start
Financial transactions with your organization's officials	<input type="checkbox"/>	Not started	Start
Real property	<input type="checkbox"/>	Not started	Start
Financial information	<input type="checkbox"/>	Not started	Start
Assets and liabilities	<input type="checkbox"/>	Not started	Start
Attachments, certification, and submit	<input type="checkbox"/>	Not started	Start

[Delete my application to become a registered charity](#)

[Return to My Business Account](#)

Here is a larger screenshot of the various parts of the charity application and in this article we will just go through the “Identification of your organization” of your organization part.

Your progress

Section	Progress	Status	Action
Identification of your organization	<input type="text"/>	Not started	Start
Previous application for registration	<input type="text"/>	Not started	Start
Organizational structure	<input type="text"/>	Not started	Start
Governing documents	<input type="text"/>	Not started	Start
Directors, trustees, and like officials	<input type="text"/>	Not started	Start
Designation	<input type="text"/>	Not started	Start
Purposes and activities	<input type="text"/>	Not started	Start
Gifts and other income generating activities	<input type="text"/>	Not started	Start
Political activities	<input type="text"/>	Not started	Start
Financial transactions with your organization's officials	<input type="text"/>	Not started	Start
Real property	<input type="text"/>	Not started	Start
Financial information	<input type="text"/>	Not started	Start
Assets and liabilities	<input type="text"/>	Not started	Start
Attachments, certification, and submit	<input type="text"/>	Not started	Start

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Notice the “Section” in the left column, the “Progress” in the second column, the “Status” in the third column and the “Action” in the fourth column.

Although there are some additional questions the section column more or less aligns with the old T2050 form.

The progress column is all white as we have not made any progress in the application.

The Status column reflects not started in all of the various sections.

The Action column has the Start in blue but then in some cases the Start is surrounded by a grey box and you will not be able to access those sections of the application unless you have previously completed a section in a particular way that allows you to access those sections.

You also have the ability to delete your application at any point.

I will be very interested to see the statistics on started but not completed applications if CRA is keeping such statistics.

After you hit start for the identification of your organization here are some of the following screens. By the way you didn’t necessarily have to start with the identification section you could have gone to another section that is not in a grey box.


[Home](#) → [My Business Account](#) → [Apply to be a Registered Charity Under the Income Tax Act](#)

Apply to be a Registered Charity Under the Income Tax Act


Identification of your organization

Other names and account numbers

Program account number: **807985049RR0001**Name: **CANADIAN CHARITY LAW ASSOCIATION**Registration status: **Pending**

* Has your organization gone by any other names (acronyms)? **(required)** 

- Yes
 No

* Does your organization have any other business number (BN) or program accounts, other than the one associated with this application?
(required) 

- Yes
 No

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Apply to be a Registered Charity Under the Income Tax Act

Identification of your organization

Locations

Program account number: 807985049RR0001

Name: CANADIAN CHARITY LAW ASSOCIATION

Registration status: Pending

If the below addresses are not correct, you must make corrections through "Manage address" on the homepage.

Physical location address (confidential) ⓘ

1202 - 390 BAY ST
TORONTO, ONTARIO
M5H2Y2
CANADA

Mailing address ⓘ

1202 - 390 BAY ST
TORONTO, ONTARIO
M5H2Y2
CANADA

Books & records address (confidential) ⓘ

(must be an address in Canada and cannot be a post office box)

1202 - 390 BAY ST
TORONTO, ONTARIO
M5H2Y2
CANADA

* Does your organization have any other locations where its activities take place? (confidential) (required) ⓘ

- Yes
 No

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Canada Revenue Agency

Logout

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Apply to be a Registered Charity Under the Income Tax Act

Identification of your organization

Email address available to the public

Program account number: 807985049RR0001

Name: CANADIAN CHARITY LAW ASSOCIATION

Registration status: Pending

* Does your organization have an email address available to the public? **(required)**

- Yes
- No

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If you answer yes then you get the following screen:

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Apply to be a Registered Charity Under the Income Tax Act

Identification of your organization

Add an email address

Program account number: 807985049RR0001

Name: CANADIAN CHARITY LAW ASSOCIATION

Registration status: Pending

Your organization has email address(es) available to the public. Enter them one at a time.

List of your organization's public email addresses

Email address
No data is available in the table

Add an email address

* Email address available to the public (required)

(Maximum 200 characters)

(Example: "Name@charityabc.ca")

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Apply to be a Registered Charity Under the Income Tax Act

Identification of your organization

Phone number available to the public

Program account number: 807985049RR0001

Name: CANADIAN CHARITY LAW ASSOCIATION

Registration status: Pending

* Does your organization have a phone number available to the public? (required)

- Yes
- No

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Apply to be a Registered Charity Under the Income Tax Act

Identification of your organization

Website available to the public

Program account number: 807985049RR0001

Name: CANADIAN CHARITY LAW ASSOCIATION

Registration status: Pending

* Does your organization have a website available to the public? (required) ⓘ

- Yes
- No

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[1-877-975-2272](#)

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Apply to be a Registered Charity Under the Income Tax Act

Identification of your organization

Social media account available to the public

Program account number: 807985049RR0001

Name: CANADIAN CHARITY LAW ASSOCIATION

Registration status: Pending

* Does your organization have a social media account available to the public? (required) ?

- Yes
- No

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If you have a social media account it asks for the type and URL. You can add a few social media accounts as below



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Apply to be a Registered Charity Under the Income Tax Act

Identification of your organization

Add another social media account

Program account number: 807985049RR0001
Name: CANADIAN CHARITY LAW ASSOCIATION
Registration status: Pending

Your organization has social media account(s) available to the public. Enter them one at a time.

List of your organization's public social media accounts

Type	Account name
Facebook	https://www.facebook.com/CanadianCharityLawAssociation/

Add another social media account

*** Social media type (required)**

(Maximum 50 characters)

(Example: "Facebook" or "Twitter")

*** Social media account name (required)**

(Maximum 200 characters)

(Example: "facebook.com/charityabc" or "twitter.com/charityabc")

Add

Cancel

[Return to overview page](#)

It then gives you a summary of each section before you finish. You can always go back to change anything – you can print pages as well as you go.

[Home](#) → [My Business Account](#) → [Apply to be a Registered Charity Under the Income Tax Act](#)

Apply to be a Registered Charity Under the Income Tax Act

Identification of your organization

Review

Program account number: 807985049RR0001
Name: CANADIAN CHARITY LAW ASSOCIATION
Registration status: Pending

Identification of your organization

▼ Other names and account numbers [Change this](#)

Has your organization gone by any other names (acronyms)?
No

Does your organization have any other business number (BN) or program accounts, other than the one associated with this application?
No

▼ Locations [Change this](#)

Physical location address (confidential)
1202 - 390 BAY ST
TORONTO, ONTARIO
M5H2Y2
CANADA

Mailing address
1202 - 390 BAY ST
TORONTO, ONTARIO
M5H2Y2
CANADA

Books & records address (confidential)
(must be an address in Canada and cannot be a post office box)
1202 - 390 BAY ST
TORONTO, ONTARIO
M5H2Y2
CANADA

Does your organization have any other locations where its activities take place? (confidential)
No

▼ Email address available to the public [Change this](#)

Does your organization have an email address available to the public?
No

▼ Phone number available to the public [Change this](#)

Does your organization have a phone number available to the public?
No

▼ Website available to the public [Change this](#)

Does your organization have a website available to the public?
No

▼ Social media account available to the public [Change this](#)

Does your organization have a social media account available to the public?
Yes

▼ Social media account(s) [Change this](#)


List of your organization's public social media accounts

Type	Account name
Facebook	https://www.facebook.com/CanadianCharityLawAssociation/

[Done with this section](#)

You can either change something or click “Done with this section”.

When you are done with this section you go back to the menu page and it shows your progress in turquoise which is my favourite colour. Thank


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Canada Revenue Agency Logout

[Home](#) → [My Business Account](#)

Apply to be a Registered Charity Under the Income Tax Act

Overview

Program account number: 807985049RR0001
 Name: CANADIAN CHARITY LAW ASSOCIATION
 Registration status: Pending

Review before you start

[Quiz - Should you apply for charitable registration?](#)
[Checklist to complete the application for registration](#)
[Privacy Notice](#)

Your progress

Section	Progress	Status	Action
Identification of your organization	<div style="width: 100%; background-color: #0070C0; height: 10px;"></div>	Complete	Review
Previous application for registration	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Organizational structure	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Governing documents	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Directors, trustees, and like officials	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Designation	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Purposes and activities	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Gifts and other income generating activities	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Political activities	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Financial transactions with your organization's officials	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Real property	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Financial information	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Assets and liabilities	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start
Attachments, certification, and submit	<div style="width: 0%; background-color: #ccc; height: 10px;"></div>	Not started	Start

[Delete my application to become a registered charity](#)

[Return to My Business Account](#)

you CRA for incorporating turquoise into the system.

Keep in mind that although the application indicates that the section has been completed you can still go back and change it prior to submission of the application if anything changes or you acquire additional information.

Just note that whenever you go back to change information on a page within a section, once you are done updating, you need to keep clicking “Next” until you get the option of clicking “Done with this section”. Otherwise, the system will revert the status of this section to “Incomplete”. While not a mistake with the system, this can be an inconvenience when you are editing a section with many pages and you should be aware of it if you are working on an application to avoid having to go back and forth between pages.

Only once all of the other sections have been completed does an applicant get access to the ‘Attachments, certification, and submit’ page. The required documents will vary based on what was entered in the application. Generally, applicants must submit their Certificate and Articles of Incorporation, along with any amendments. If there has been any changes in directors since the corporation was incorporated, the applicant must also submit evidence of that change either from their jurisdiction of incorporation (e.g. Form 1: Notice of Change in Ontario or Form 4006 Federally). Applicants are also given 3 additional slots, which they can use to upload any additional documents in support of their application.

Glitches with the system

Keep in mind that this is a brand-new system that CRA has had to work into an existing framework, and there are bound to be some issues at the beginning. It is best to inform the Charities Directorate whenever you notice an issue with the system so that they can move to address it.

New to the application, if an applicant indicates in the ‘Designation’ section that they will be gifting funds to other qualified donees, they are now asked to identify the qualified donees they intend to give to and the anticipated amounts the applicant intends to gift to each of those qualified donees. On the previous T2050, the question was: “Has the organization been formed to give more than 50% of its income to qualified donees (e.g., other Canadian registered charities)?”. However, we have noticed that this question creates a problem in the online system.

Some organizations will have a ‘gift to qualified donees’ object to allow them to give to the qualified donee of their choice. In the case of an organization that is applying for charitable status, the applicant would need to include an activity that supports this object for their Charity Application, and any activity must include a budget. The problem is that if an applicant puts in an amount for gift to qualified donees under the ‘Designation’ section and an activity that includes gifts to qualified donees under the ‘activities and purposes’ section, the financial section of the application, which auto-populates based on what is entered in the rest of the application, and counts the gifts to qualified donees twice (once from the Designation section and once from the Purposes and Activities section), overinflating the budget of the applicant. An applicant must put in an amount for both sections and cannot enter ‘0’.

CRA is aware of this glitch and hopefully this will be resolved soon. However, in the meantime, applicants are encouraged to attach an explanation to their application, explaining the double counting in the system.

Once you are able to get into this system and find the charity application, the process become much more clear and we do think that with more improvements, this will become a good tool and make the application process better. Unfortunately, we are still in the early stages, and we must work through any delays and glitches in the system. Should you come across any issues or technical problems when working with this system, we suggest that you call the Charities Directorate (1-800-267-2384) and let them know of the issue. They will either be able to tell you how to fix the problem or will make note of the issue so that they can work at fixing it. If they are not aware of the issue, it will never be resolved.

Mark Blumberg and Maddy Sawyer are lawyers at Blumberg Segal LLP in Toronto, Canada. To find out more about legal services that Blumbergs provides to Canadian charities and non-profits as well as foreign charities please visit www.canadiancharitylaw.ca, www.globalphilanthropy.ca, www.smartgiving.ca, or www.charitydata.ca You can contact Blumberg Segal LLP at https://www.canadiancharitylaw.ca/contact_us or by telephone at 416-361-1982 or Toll-Free: 1-866-961-1982 or charity@blumbergs.ca

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Apply to be a Registered Charity Under the Income Tax Act

Program Account Number: _____ RR _____

Legal Name: _____

Section A – Identification of your organization

Other Names and account numbers

Has your organization gone by any other names or acronyms, including any names in other languages? Yes No

If yes, enter the names or acronyms.

Does your organization have any other business number (BN) or program accounts, other than the one associated with this application? Yes No

For more information about business numbers, go to canada.ca/taxes, select "Business number registration," and see "When you need a business number or CRA program accounts."

If yes, then enter the other account number(s) (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001").

Physical location address (confidential)

Enter either a complete street address or a legal description of the physical location (for example, a lot or concession number) that clearly shows where the organization carries out its activities. If the organization uses more than one location, give us the location where most of the organization's activities take place. A post office box number or rural route number alone is not sufficient.

Address line 1 (confidential)		Address line 2 (confidential)	
City (confidential)	Province/state/district (confidential)	Postal code/zip code (confidential)	Country (confidential)

Mailing address

Give a complete mailing address (street name and number, floor, suite or apartment number, post office box number, rural route number, postal code). This is the address the CRA will use when we send mail to the organization.

Address line 1		Address line 2	
City	Province/state/district	Postal code/zip code	Country

Books & records address (confidential)

Books and records must be kept at a Canadian address. This address has to be complete and include the street number, street name, apartment, suite, or lot and concession number; city; province or territory; and postal code. A post office box or a rural route number alone is not acceptable; it needs to be a place where a CRA auditor could visit. If stored electronically, provide the address of the computer or server where the books and records are stored. For more information, go to canada.ca/charities-giving, select "Operating a registered charity," and see "Books and records."

Address line 1 (confidential)		Address line 2 (confidential)	
City (confidential)	Province/state/district (confidential)	Postal code/zip code (confidential)	Country (confidential)

Other Locations (Confidential)

Does your organization have any other locations where its activities take place? Yes No

This could be a branch or satellite location. It could also include the location of shelters for victims of domestic abuse that the organization wishes to keep confidential.

If yes, provide the address in the box below. If your activities take place at more than one location, provide the address(es) on a separate page.

Address line 1 (confidential)		Address line 2 (confidential)	
City (confidential)	Province/state/district (confidential)	Postal code/zip code (confidential)	Country (confidential)

Email address available to the public

Does your organization have an email address(es) available to the public (example: Name@charityabc.ca)? Yes No

If yes, provide it/them below.

Phone number available to the public

Does your organization have a phone number available to the public? Yes No

If yes, provide it below.

Website available to the public

Does your organization have a website available to the public (example: www.charityabc.ca)? Yes No

If yes, provide it below.

Social media account available to the public

Does your organization have a social media account available to the public? Yes No

If yes, then provide the social media type (Example: "Facebook" or "Twitter") and the account name. (Example: "facebook.com/charityabc" or "twitter.com/charityabc") below.

Section B – Previous application for registration

Has your organization ever applied to be a registered charity under the Income Tax Act? (confidential) Yes No

Select "Yes" if your organization has previously submitted an application to register as a charity or registered Canadian amateur athletic association with the CRA.

If yes, what was the name of your organization on your previous application? (confidential)

If yes, what was the CRA file number assigned to your previous application? (confidential)

Give the reference number assigned to the organization. This reference number is on the first page of any written correspondence sent from the CRA.

Section C – Organizational structure

Is your organization applying as an internal division of a registered charity? Yes No

If your organization is applying as an internal division of a registered charity, you will be required to provide a letter of good standing from your head body. If you do not have one, contact your head body to obtain this letter and attach it to this application. For information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Head bodies and their internal divisions. CG-028."

If yes, what is the name of the registered charity?

If yes, what is the account number of the registered charity? (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001")

Section D – Governing documents**How is your organization governed?**

For more information, go to canada.ca/charities-registration, select "Set up your organization before applying for registration," and see "What is a governing document?"

 Incorporated for less than 5 years

You are required to submit the following documents with your application for registration:

- A complete set of your organization's Incorporation documents, including all amendments, if applicable
- A copy of your organization's by-laws and all amendments, if applicable

 Incorporated for more than 5 years

You are required to submit the following documents with your application for registration:

- A complete set of your organization's Incorporation documents, including all amendments, if applicable
- A copy of your organization's by-laws and all amendments, if applicable
- A certificate of good standing or status or its equivalent

 Constitution

You are required to submit the following documents with your application for registration:

- Your organization's Constitution, including all amendments, if applicable
- A copy of your organization's by-laws and all amendments, if applicable

 Trust

You are required to submit the following documents with your application for registration:

- Your organization's Trust document, including all amendments, if applicable
- A copy of your organization's by-laws and all amendments, if applicable

 Will

You are required to submit the following documents with your application for registration:

- Your organization's Will document
- A copy of your organization's by-laws and all amendments, if applicable

Other: _____

Section E – Directors, trustees, and like officials

Your organization has directors and/or trustees. Enter their complete information.

Name of director or trustee (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> President <input type="checkbox"/> Vice-president <input type="checkbox"/> Treasurer <input type="checkbox"/> Secretary <input type="checkbox"/> Chair <input type="checkbox"/> Vice-chair <input type="checkbox"/> Director <input type="checkbox"/> Trustee <input type="checkbox"/> Board member <input type="checkbox"/> Other			
Date first elected to the board (YYYY-MM-DD)	Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)	
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)	Employer (confidential)	
Occupation (confidential)	Date of birth of this board member (confidential) (YYYY-MM-DD)		

Name of director or trustee (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> President <input type="checkbox"/> Vice-president <input type="checkbox"/> Treasurer <input type="checkbox"/> Secretary <input type="checkbox"/> Chair <input type="checkbox"/> Vice-chair <input type="checkbox"/> Director <input type="checkbox"/> Trustee <input type="checkbox"/> Board member <input type="checkbox"/> Other			
Date first elected to the board (YYYY-MM-DD)	Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)	
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)	Employer (confidential)	
Occupation (confidential)	Date of birth of this board member (confidential) (YYYY-MM-DD)		

Name of director or trustee (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> President <input type="checkbox"/> Vice-president <input type="checkbox"/> Treasurer <input type="checkbox"/> Secretary <input type="checkbox"/> Chair <input type="checkbox"/> Vice-chair <input type="checkbox"/> Director <input type="checkbox"/> Trustee <input type="checkbox"/> Board member <input type="checkbox"/> Other			
Date first elected to the board (YYYY-MM-DD)	Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)	
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)	Employer (confidential)	
Occupation (confidential)	Date of birth of this board member (confidential) (YYYY-MM-DD)		

I will provide the documentary evidence of a change in directors and/or trustees (i.e. meeting minutes or documentation from the province) with this application for registration, if applicable

Note: If you added or deleted directors and/or trustees since your organization was first established, you are required to provide the documentary evidence of a change in director(s) and/or trustee(s) (i.e. meeting minutes or documentation from the province) with this application for registration.

Note: To add additional directors or trustees, complete Appendix A provided at the end of the form.

Like officials

Is there anyone else with authority or governing responsibilities in your organization who was not already listed as a board member, director or trustee (such as a chief executive officer, executive director, spiritual leader)?

Yes No

For more information, go to canada.ca/charities-giving, select "A to Z index of topics for charities," search for "Glossary," and see "Like official".

If yes, enter their complete information below.

Name of like official (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> CEO <input type="checkbox"/> Executive director <input type="checkbox"/> Spiritual leader <input type="checkbox"/> General manager <input type="checkbox"/> Other _____			
Date first elected to the board (YYYY-MM-DD)	Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)	
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)	Employer (confidential)	
Occupation (confidential)	Date of birth of this board member (confidential) (YYYY-MM-DD)		

Note: To add additional like officials, complete Appendix B provided at the end of the form.

Contact person

For registration purposes, you must provide a contact person. A contact person can be anyone in the organization such as a director, trustee, like official or person completing this application for registration on behalf of the organization. The reason we need this information is so that we know who to call if we need to clarify the information provided on this application for registration.

If the contact person is a director, trustee, or like official, provide the name:

Name:

If it is an organization (such as a law firm), provide the complete information:

Legal name of firm or company (confidential)		Legal name of the contact person at the firm or company (confidential)
Firm reference number (confidential)		Firm business number (BN) (confidential)
Address (confidential)		Country (confidential)
Phone number (confidential)	Email address (confidential)	Additional email address (confidential)

If it is a person other than a director, trustee, or like official indicated above, provide the complete information:

Legal name of individual (Title, first name, last name) (confidential)	Date of birth (YYYY-MM-DD) (confidential)	
Residential address (confidential)	Country (confidential)	Phone number (confidential)
Email address (confidential)		

Section F – Désignation

The information in this section will help us determine if your organization is a charitable organization, a public foundation, or a private foundation. For more information, go to canada.ca/charities-registration, select "Set up your organization before applying for registration," and see "Types of registered charities (designations)."

Approximately what percentage of your organization's annual income (cash and non-cash) will be:

Non-cash gifts are gifts of property such as artwork, equipment, securities, cultural or ecological property.

Used for charitable activities carried on by the organization itself? %

If your organization plans to give some of its income to another registered charity or qualified donee, do not include this as part of your charitable activities.

Gifted to qualified donees? %

For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Qualified donees, CG-010."

If a percentage of your organization's annual income will be given to qualified donees, provide us with the following information:

Name of qualified donee (if you don't know the name, enter unknown):	
Account number (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001")	Anticipated amount (CANS):

Name of qualified donee (if you don't know the name, enter unknown):	
Account number (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001")	Anticipated amount (CANS):

Name of qualified donee (if you don't know the name, enter unknown):	
Account number (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001")	Anticipated amount (CANS):

Are any members of the board or anyone else with authority or governing responsibilities in your organization not at arm's length with each other? Yes No
 Not at arm's length relationships include blood relatives, adopted children, common law relationships, marriage and close business ties.

For more information go to canada.ca/charities-giving, select "A to Z index of topics for charities," "Glossary," and see "Arm's length".

If yes, complete the following information:

First individual	Second individual
Description of relationship (Example: "spouse", "siblings", "business partners") (confidential):	

First individual	Second individual
Description of relationship (Example: "spouse", "siblings", "business partners") (confidential):	

First individual	Second individual
Description of relationship (Example: "spouse", "siblings", "business partners") (confidential):	

Has your organization received, or will it receive, a total of more than 50% of its capital from one or more major contributors?

Yes No

A major contributor is a person (an individual, corporation, trust, or unincorporated entity), or a group of persons who are not at arm's length, or any individual member thereof, from which the organization receives more than 50% of its capital (funds or assets).

Example: An organization has received a \$500,000 donation from one donor, Richard Rich. The organization's total assets are \$800,000 and the organization is made up of a three-member board of directors/trustees: Dave Rich, Emily Cook, Christine Petrovic. Since Richard Rich has contributed more than 50% of the organization's capital, he is considered a major contributor.

If yes, then provide the name(s) of major contributor(s) (confidential).

If the major contributor(s), or anyone not at arm's length with the major contributor(s), has or will have ongoing involvement, such as voting rights, with your organization, give their names, a description of the relationship, and the nature of their involvement (confidential).

Empty box with horizontal lines for providing names and descriptions of relationships.

Describe any non arm's length relationships that exist between your organization's directors, trustees, or like officials and the major contributor(s) or any person who is not at arm's length with the major contributor(s) (confidential).

The following are examples of what could be considered to be a non-arm's length relationship by a major contributor: The major contributor is a spouse of one of the directors. The major contributor is the brother of someone that has governing authority over the organization, such as a minister of the church. The major contributor's company has an employee that also has close business ties to the organization.

Empty box with horizontal lines for describing non-arm's length relationships.

Section G – Purposes and Activities

To qualify for registration as a charity, an organization must have purposes that are exclusively charitable and charitable activities that support those purposes. The purposes (also called objects) describe the aim or main intent of the organization.

An organization's purposes and activities must fall under one of four categories of charity:

- 1. Relief of poverty;
For more information, go to canada.ca/charities-registration, select "Set up your organization before applying for registration," then "Charitable purposes." and see "Relief of poverty."
2. Advancement of education;
For more information, go to canada.ca/charities-registration, select "Set up your organization before applying for registration," then "Charitable purposes." and see "Relief of education."
3. Advancement of religion;
For more information, go to canada.ca/charities-registration, select "Set up your organization before applying for registration." then "Charitable purposes." and see "Advancement of religion."
4. Other purposes beneficial to the community;
For more information, go to canada.ca/charities-registration, select "Set up your organization before applying for registration," then "Charitable purposes," and see "Other purposes beneficial to the community."

What are your organization's purposes, as stated in its governing document?

For more information, go to canada.ca/charities-registration, select "Set up your organization before applying for registration," and see "What is a governing document?"

1.	
2.	
3.	
4.	
5.	
6.	

Note: If additional space is required, provide the information on a separate page.

What activities will your organization carry out to fulfill each of its purposes? Failure to provide a complete description of all your organization's activities may result in denial of registration.

Note: If you plan to carry out more than one activity to fulfill your purposes, enter this information on Appendix C, provided at the end of the form.

Note: Each activity will require its own copy of Appendix C.

Activity:

Enter the name of the activity you will be doing. For example: Providing social or recreational activities to relieve the social isolation and loneliness of seniors; providing scholarships; operating an animal shelter.

Describe the activity, including information about what will be done, and how it will be carried out.

Provide as much detailed information as possible to allow the Charities Directorate to determine if the activities are charitable. Even if the organization is not yet in operation, it must describe its proposed activities in as much detail as possible. The courts have stated that charitable registration can be denied to organizations that do not provide enough information describing their current and/or proposed activities.

I have supporting documentation for this activity such as pamphlets, brochures, or other materials, which I will provide with this application for registration.

Is your organization carrying out this activity now? Yes No

If no, then what is the anticipated start date of the activity? (YYYY-MM):

Will another organization, partner, or intermediary help your organization carry out this activity?

For information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Intermediaries (activities within Canada), CG-004."

Yes, and we have written agreements that we will provide with this application for registration Yes, and we do not have any written agreements No

If yes and you have no written agreements, describe the work arrangements, and give the names and contact information of the organization(s) or individual(s) (confidential).

Large empty rectangular box with horizontal lines for providing details on work arrangements and contact information.

Where will this activity take place and what are the associated expenditures?

Enter the general geographical location where your activity will take place.

Address line 1 (confidential)		Address line 2 (confidential)	
City (confidential)	Province/state/district (confidential)	Postal code/zip code (confidential)	Country

Anticipated expenditures for this activity at this location: (CANS) \$

If this activity is going to take place in more locations, provide any additional addresses and associated expenditures on a separate page.

Large empty rectangular box with horizontal lines for providing additional addresses and expenditures.

Indicate which purpose this activity helps support.

When determining if an organization can be registered, we need to know what activities the organization will carry out to achieve each of the formal purposes listed in its governing documents.

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If one or more of your purposes is not supported by any activities, provide an explanation.

<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

If one or more of your activities does not support any purposes, provide an explanation.

<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Does your organization expect to have any relationships with other organizations that you have not already described in this section?

Yes No

An example of a relationship with another organization could include a joint initiative, common project, or sharing of resources to carry out activities in furtherance of the organization's purposes, regardless of whether or not the collaborating organization is a qualified donee.

If yes, describe the relationship with other organizations.

<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Does your organization intend to take over the activities, assets or liabilities from a former or current registered charity, non-profit organization, or other entity? Yes No

If yes, complete the following information:

(If the organization is a registered charity, all information will be public. If the organization is a non-profit organization or other entity, the name and account number will be confidential.)

Name of the organization: Enter the legal name of the organization.	Account number (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001"):
---	---

Why is your organization taking over these activities, assets or liabilities?

Other anticipated expenditures related to your organization's purposes and activities that have not been reported (such as administration, management, or professional fees): (CANS)

Section H – Gifts and other income generating activities

Select one or more of the activities that your organization will receive funds or generate income through. For each activity you select, you will need to provide more information.

Gifts from individuals

For more information, go to canada.ca/charities-giving, select "A to Z index of topics for charities," search for "Glossary," and see "Gift."

Enter the total amount of individual gifts your organization expects to receive by country:

Country:	Anticipated income: (CANS):

Gifts from corporations and businesses

For more information, go to canada.ca/charities-giving, select "A to Z index of topics for charities," search for "Glossary," and see "Gift."

Enter the details for each corporation or business:

Name of corporation or business (confidential) (if you don't know the name, enter unknown):	Business number (confidential)	Country (confidential)	Anticipated income: (CANS)

Gifts from qualified donees

For more information, go to canada.ca/charities-giving, select "A to Z index of topics for charities," search for "Glossary," and see "Qualified donee."

Enter the details for each qualified donee:

Name of qualified donee (if you don't know the name, enter unknown):	Account number (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001"):	Anticipated income: (CANS)

Canadian or foreign government contracts, contributions, or grants

Select how your organization will provide details about the government contract, contribution, or grant:

We will provide copies of the government contract(s), contribution or grant documents with this application for registration (confidential)

We will provide the details below:

Enter the details of the government contract, contribution or grant:

Form with four horizontal lines for text entry.

Country (confidential):	Anticipated income: (CANS)
-------------------------	----------------------------

Enter the details of the government contract, contribution or grant:

Form with four horizontal lines for text entry.

Country (confidential):	Anticipated income: (CANS)
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Sale of goods and/or services

This refers to any fees or regular income received from the sale of goods or services. The term "regular" does not necessarily mean daily. It means on a repeated basis where there is a system in place and continuity to transactions being carried on, such as fees earned by a church that rents out its parking lot on weekdays. This question includes revenue from goods or services provided as part of the organization's activities, such as admissions to a museum, the sale of goods produced by students in a trades training program, monthly operation of a used clothing store, or an annual summer camp.

For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Business activity - What is a related business?, CPS-019."

Enter the following details:

Describe this activity, including information about when and how often it will take place.

Form with five horizontal lines for text entry.

Country or countries where this activity will take place:

Horizontal line for text entry.

What percentage of the people involved in this activity are not compensated (such as volunteers, co-op students)?

What is the anticipated income generated from this activity by the organization itself? (CAN\$)

What are the anticipated expenditures associated with this activity by the organization itself? (CAN\$)

Does your organization intend to use a third party or to hire a fundraising company for this activity? For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more." then "Index of guidance products and policies." and see "Fundraising - Third party fundraisers, CPC-026."

- Yes, and we will provide copies of the fundraising contract(s) with this application for registration (confidential) No

If yes, answer the following:

a) What is the anticipated income generated from this activity through third party fundraisers? (CAN\$)

b) What are the anticipated expenditures associated with this activity through third party fundraisers? (CAN\$)

- Use of assets (such as rental property, investment income)

Examples could include: Rent from a seniors home the charity operates; and income from leasing surplus space such as in a church parking lot or a university residence.

Enter the following details:

Describe this activity, including information about when and how often it will take place.

Large empty rectangular box for describing the activity.

Country or countries where this activity will take place:

What percentage of the people involved in this activity are not compensated (such as volunteers, co-op students)?

What is the anticipated income generated from this activity by the organization itself? (CAN\$) \$

What are the anticipated expenditures associated with this activity by the organization itself? (CAN\$) \$

Does your organization intend to use a third party or to hire a fundraising company for this activity?

For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Fundraising - Third party fundraisers. CPC-026."

Yes, and we will provide copies of the fundraising contract(s) with this application for registration (confidential) No

If yes, answer the following:

a) What is the anticipated income generated from this activity through third party fundraisers? (CANS) \$

b) What are the anticipated expenditures associated with this activity through third party fundraisers? (CAN\$) \$

Lotteries and/or games of chance (such as bingo, Nevada tickets)

Enter the following details:

Describe this activity, including information about when and how often it will take place.

Large empty box for describing the activity details.

Country or countries where this activity will take place:

What percentage of the people involved in this activity are not compensated (such as volunteers, co-op students)? %

What is the anticipated income generated from this activity by the organization itself? (CAN\$) \$

What are the anticipated expenditures associated with this activity by the organization itself? (CAN\$) \$

Does your organization intend to use a third party or to hire a fundraising company for this activity?

For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Fundraising - Third party fundraisers, CPC-026."

Yes, and we will provide copies of the fundraising contract(s) with this application for registration (confidential) No

If yes, answer the following:

a) What is the anticipated income generated from this activity through third party fundraisers? (CAN\$) \$

b) What are the anticipated expenditures associated with this activity through third party fundraisers? (CAN\$) \$

Organized events (such as galas, dinners, auctions, concerts)

Enter the following details:

Describe this activity, including information about when and how often it will take place.

Empty text box for describing the activity.

Country or countries where this activity will take place:

Empty text box for country information.

What percentage of the people involved in this activity are not compensated (such as volunteers, co-op students)? %

What is the anticipated income generated from this activity by the organization itself? (CAN\$) \$

What are the anticipated expenditures associated with this activity by the organization itself? (CAN\$) \$

Does your organization intend to use a third party or to hire a fundraising company for this activity?

For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Fundraising - Third party fundraisers, CPC-026."

Yes, and we will provide copies of the fundraising contract(s) with this application for registration (confidential) No

a) What is the anticipated income generated from this activity through third party fundraisers? (CAN\$) \$

b) What are the anticipated expenditures associated with this activity through third party fundraisers? (CAN\$) \$

Sporting tournaments/races

Describe this activity, including information about when and how often it will take place.

Large empty rectangular box for describing the activity.

Country or countries where this activity will take place:

What percentage of the people involved in this activity are not compensated (such as volunteers, co-op students)? %

What is the anticipated income generated from this activity by the organization itself? (CAN\$) \$

What are the anticipated expenditures associated with this activity by the organization itself? (CAN\$) \$

Does your organization intend to use a third party or to hire a fundraising company for this activity? For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Fundraising - Third party fundraisers. CPC-026."

Yes, and we will provide copies of the fundraising contract(s) with this application for registration (confidential) No

If yes, answer the following:

a) What is the anticipated income generated from this activity through third party fundraisers? (CAN\$) \$

b) What are the anticipated expenditures associated with this activity through third party fundraisers? (CAN\$) \$

Direct solicitation (such as telephone, door-to-door, letter campaign)

Describe this activity, including information about when and how often it will take place.

Country or countries where this activity will take place:

--

What percentage of the people involved in this activity are not compensated (such as volunteers, co-op students)? %

What is the anticipated income generated from this activity by the organization itself? (CAN\$) \$

What are the anticipated expenditures associated with this activity by the organization itself? (CAN\$) \$

Does your organization intend to use a third party or to hire a fundraising company for this activity?

For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Fundraising - Third party fundraisers, CPC-026."

Yes, and we will provide copies of the fundraising contract(s) with this application for registration (confidential) No

If yes, answer the following:

a) What is the anticipated income generated from this activity through third party fundraisers? (CAN\$) \$

b) What are the anticipated expenditures associated with this activity through third party fundraisers? (CAN\$) \$

Non-cash gifts (such as used goods, art work, securities)

Describe the types of non-cash gifts your organization expects to receive (such as used goods, art work, securities).

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a) What is the anticipated income generated from receiving non-cash gifts? (CAN\$) \$

b) What are the anticipated expenditures associated with receiving non-cash gifts? (CAN\$) \$

Other (such as membership fees, selling advertising, crowdfunding)

Enter the following details:

Describe how the other funds will be raised and the activities associated with it.

<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

a) What is the anticipated income generated from other activities? (CAN\$) \$

b) What are the anticipated expenditures associated with other activities? (CAN\$) \$

Section I – Political activities

A charity may not take part in any partisan activity. Does your organization agree that it will not take part in any partisan political activities?

Yes No

Non-partisan political activities

A charity may use a limited amount of their resources to take part in non-partisan political activities that are connected to, or serve, the charity's purposes, such as:

- explicitly communicating a call to political action
- explicitly communicating to the public that the law, policy or decision of any level of government in Canada or a foreign country should be retained (if the retention of the law, policy or decision is being reconsidered by a government), opposed, or changed
- explicitly indicating in its materials (whether internal or external) that the intention of the activity is to incite, or organize to put pressure on, an elected representative or public official to retain, oppose, or change the law, policy, or decision of any level of government in Canada or a foreign country
- gifting resources to another qualified donee to support their political activities

Will your organization use any of its resources to take part in permitted political activities?

Yes No

If yes, answer the following:

a) Describe these permitted political activities and how they will help achieve your organization's formal purposes.

b) Select all the resources that your organization will devote to political activities:

The term resource is not defined in the Income Tax Act, but we consider it to include the total of financial assets, as well as everything the organization can use to further its purposes. This includes employees, volunteers, money, and property (such as buildings, equipment, land, and supplies).

Example: Organization ABC plans to rally on Parliament Hill to urge the government to change the drug review process. It will use staff to organize and plan the rally, and financial resources to rent buses to transport supporters to the rally. For this organization, they would select both "Paid employees" and "Financial resources."

- Paid employees
- Volunteers
- Financial resources
- Physical resources (such as property)
- Other. Specify _____

c) Anticipated expenditures on political activities: (CAN\$) _____ \$

Section J – Financial transactions with your organization's officials

Does your organization have, or plan to have, any financial arrangements or transactions (such as leases, loans, transfers of real estate, paid salaries or compensation) with any of its founders, board members, directors, trustees or like officials, or with any persons or organizations related to them?

Yes No

If yes, select which financial arrangements or transactions your organization has or plans to have with any of its founders, board members, directors, trustees, like officials or any other persons or organizations related to your organization.

Salary and compensation

Details (confidential)

Describe the nature of the service(s) that your organization's official(s) (founder, board member, director, trustee or like official) is providing or will provide in return for salary and compensation.

Anticipated amount: (CAN\$) \$

Real estate and leases

We will provide copies of the real estate and lease agreements with this application for registration (confidential)

Details (confidential)

Provide the following information if it is not contained in your agreement:

- title on the deed of the property
- whether your organization will be improving the facilities it leases by using its own funds and resources
- a leasehold improvement clause requiring the landlord to compensate your organization for the fair market value of the improvements
- for lease agreements, the fair market value of rental space must also be provided

Anticipated amount: (CAN\$) \$

Contracts and loans

Details (confidential)

Provide information such as the length of the contract or loan, the terms of repayment, the interest rate.

Anticipated amount: (CAN\$) \$

Other agreements (e.g. per diem)

Details (confidential)

Describe any other agreements that your organization has entered into with its officials (such as per diems for travel, food, accommodation or guest speaking fees).

Anticipated amount: (CAN\$) \$

Section K – Real property

Does your organization own any real property, such as land or buildings? Yes No

If yes, enter the address(es) of any property (properties) your organization currently owns (confidential).

Address line 1 (confidential)		Address line 2 (confidential)	
City (confidential)	Province/state/district (confidential)	Postal code/zip code (confidential)	Country (confidential)

Describe the property and title-holder arrangements (confidential).

For example, property ABC is held directly by our organization. Property XYZ is held in trust by Company A.

We will provide related documents, such as deed, mortgage, or property tax assessment with this application for registration (confidential)

Note: If additional space is required or if you own additional property(ies), provide the information on a separate page.

Does your organization have any future plans to own real property, such as land or buildings? (confidential)

Yes No

If yes, enter the address(es) of any property (properties) your organization plans to own in the future (confidential).

Address line 1 (confidential)		Address line 2 (confidential)	
City (confidential)	Province/state/district (confidential)	Postal code/zip code (confidential)	Country (confidential)

Describe the property and title-holder arrangements (confidential).

For example, property ABC is held directly by our organization. Property XYZ is held in trust by Company A.

We will provide related documents, such as deed, mortgage, or property tax assessment with this application for registration (confidential)

Note: If additional space is required or if you plan to own additional property(ies), provide the information on a separate page.

Does your organization rent any real property from someone else (such as land or buildings)? (confidential)

Yes No

If yes, enter the address(es) of any property (properties) your organization rents (confidential).

Address line 1 (confidential)		Address line 2 (confidential)	
City (confidential)	Province/state/district (confidential)	Postal code/zip code (confidential)	Country (confidential)

Describe the type of property and name the property owner/landlord/property management company (confidential)

Does your organization plan to carry out any leasehold improvements to the property? Yes No

For more information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Lease – Registered charities making improvements to property leased from others, CPS-006."

I will provide the property rental or lease agreement with this application for registration (confidential)

Note: If additional space is required or if you rent additional property(ies) from someone else, provide the information on a separate page.

Section L – Financial Information

Has your organization been operating for more than one year? Yes No

If yes:

I will provide the organization's most recent financial statements with this application for registration.

If no, when do you plan to begin operations? (YYYY-MM-DD)

When is your organization's fiscal period end? (MM-DD)

Proposed operating budget

Your organization's proposed operating budget (including income and expenditures) for the next fiscal year based on the numbers you entered in previous sections of this application (covering a 12 month period).

Proposed operating budget – Income (CANS)

Gifts from Individuals	
Gifts from corporations and businesses	
Gifts from qualified donees	
Canadian or foreign government contracts, contributions, or grants	
Income generated from sales of goods and/or services and use of assets by the organization itself	
Income generated from sales of goods and/or services and the use of assets through third party fundraisers	
Income generated from fundraising activities by the organization itself	
Income generated from fundraising activities through third party fundraisers	
Non-cash gifts	
Other generated income	
Total income (CANS)	

Proposed operating budget – Expenditures (CANS)

Program activities taking place in Canada	
Program activities taking place outside Canada	
Gifts from qualified donees	
Political activities	
Expenditures associated with income generated from sales of goods and/or services and use of assets by the organization itself	
Expenditures associated with income generated from the sale of goods and/or services and the use of assets through third party fundraisers	
Expenditures associated with income generated from fundraising activities by the organization itself	
Expenditures associated with income generated from fundraising activities through third party fundraisers	
Expenditures associated with income generated from non-cash gifts	
Expenditures associated with income generated from other activities	
Other expenditures	
Total expenditures (CANS)	

Proposed operating budget – Summary

Total income (CANS)	Total expenditures (CANS)
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If your organization's expenditures are less than its income, enter an explanation in the area provided. According to the courts, a registered charity is required to devote all of its resources (funds, personnel, and property) to activities that further its charitable purposes.

If your organization plans to run a deficit (i.e. spending too much money carrying out its activities and/or not generating enough revenue), enter an explanation in the area provided.

Section M – Assets and liabilities

Assets

Does your organization have any assets? Yes No

An asset is the cash in your bank account, short term investments, long term investments, or property. Your assets are made up of cash + investments + capital assets (such as buildings, and vehicles). Your capital assets should be calculated at the fair market value. Fair market value is normally the highest price, expressed in dollars that property would bring in an open and unrestricted market, between a willing buyer and a willing seller who are both knowledgeable, informed, and prudent, and who are acting independently of each other. For more information, go to canada.ca/charities-giving, select "Operating a registered charity," then "Issuing receipts or receiving donations," then "Issuing receipts" and see "Determining fair market value of non-cash gifts."

If yes, enter the cost of the asset or, if the asset was donated, the fair market value at the time it was donated.

Cash: (CANS)	Investments (bonds, securities, GICs): (CANS)	Capital assets (equipment, buildings, land, vehicles): (CANS)
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Description of capital assets

Were any of your assets received from a current registered charity, non-profit organization, or entity? Yes No

If yes, provide the following information for each registered charity, non-profit organization, or entity:
 *If the organization is a registered charity, all information will be public. If the organization is a non-profit organization or other entity, the name will be confidential.

Name of the registered charity, non-profit organization, or entity:	
Account number (registered charities only) (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001"):	
"Description of assets (Examples: "cash", "bonds", "building", "vehicle"):	Total value of assets received (CANS):

Name of the registered charity, non-profit organization, or entity:	
Account number (registered charities only) (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001"):	
"Description of assets (Examples: "cash", "bonds", "building", "vehicle"):	Total value of assets received (CANS):

Name of the registered charity, non-profit organization, or entity:	
Account number (registered charities only) (9 digits, 2 letters, 4 digits. Example: "123456789 RR 0001"):	
"Description of assets (Examples: "cash", "bonds", "building", "vehicle"):	Total value of assets received (CANS):

Note: If additional space is required or if you have more assets to declare, provide the information on a separate page.

Liabilities

Does your organization have any liabilities? Yes No

Liabilities are amounts the organization will have to pay in the future, including, but not limited to a mortgage, an outstanding bill, or deferred revenue.

If yes, provide the following information for each liability:

Nature of the liability (Example: "Mortgage", "Amounts owed for services received", "Amounts owed to retired employees")	
Individual or organization to whom this liability is owed (confidential):	
Approximately how much your organization will owe on this liability by the end of its fiscal year: (CANS)	

Nature of the liability (Example: "Mortgage", "Amounts owed for services received", "Amounts owed to retired employees")	
Individual or organization to whom this liability is owed (confidential):	
Approximately how much your organization will owe on this liability by the end of its fiscal year: (CANS)	

Nature of the liability (Example: "Mortgage", "Amounts owed for services received", "Amounts owed to retired employees")
Individual or organization to whom this liability is owed (confidential):
Approximately how much your organization will owe on this liability by the end of its fiscal year: (CANS)

Does your organization own more than 2% of the outstanding shares of any class of shares of a corporation? Yes No

A share represents ownership in a corporation. Some corporations issue more than one class of share, where the holders of different classes of shares are entitled to different treatment, and all holders of the same class of shares are treated the same. For example, holders of Class A shares have voting rights, but holders of Class B shares do not.

If yes, provide details, including the name of the company, and the types of shares (confidential).

Does your organization directly hold any investments or interests in partnerships? Yes No

For more information, go to canada.ca/revenue-agency, under "Corporate information," select "Corporate reports," then "Federal government budgets and other federal legislative announcements," then "Budget 2015 - Strong Leadership," and see "Investments by Registered Charities in Limited Partnerships."

If yes, what percentage of these investments or interests in partnerships does your organization hold? %

Privacy Statement

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, like officials, contacts for application purposes, 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 personal tax information, and relevant financial and biographical information. Personal information will be used to assess the risk of registration with respect to the obligations and requirements as outlined in the Act and the common law.

If the application is approved and the organization is registered, the Canada Revenue Agency (CRA) is permitted to make certain information from the application (including any attachments) and copies of the registration letter (including any conditions and warnings contained therein) available to the public, with the exception of information marked as confidential. If registration is denied, the information will not be provided to the public. Personal information may also be disclosed to the applicant organization, contacts for application purposes and authorized representatives, as well as other government agencies and departments under information-sharing agreements, and in accordance with section 241 of the Act. Incomplete or inaccurate information may result in the Charities Directorate not processing the application, or may result in a refusal to register.

Personal information is described in personal information bank 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. 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 organization to voluntarily inform its directors and like officials that it has collected and disclosed their personal information to the CRA.

I confirm that I have read the Privacy notice above.

Name	Date	Signature
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Certification

This application for registration must be certified and submitted by one director, trustee or like official of the organization who has authority to sign on behalf of the organization. It is a serious offence under the Income Tax Act to provide false or deceptive information. The consequences of providing false or deceptive information may include revocation.

Ensure that you provide us with the following documents, as they apply to your organization:

- Governing documents, including all amendments and any bylaws. This also includes a Certificate of good standing or status, or its equivalent
- A Letter of Good Standing
- Meeting minutes or documents to indicate a change in directors
- Pamphlets, brochures, or other supporting activity material
- Written agreements with organizations, partners or intermediaries
- Government contracts, contributions or grants
- Contracts with third parties and/or fundraising companies
- Loan or lease agreements or any other written arrangements with the organization's officials
- Real estate and/or lease agreements
- Deeds, mortgages and/or property tax assessments
- Property rental and/or lease agreements
- Financial Statements

For those applying for re-registration:

Please note that we will not review this application until such time as all outstanding returns have been filed and deemed to be complete. In addition, you will have to send a cheque payable to the Receiver General for Canada of the amount of \$500 for the late-filing penalty. Mail it to the following address:

Charities Directorate
Canada Revenue Agency
Ottawa ON K1A 0L5

I certify that I am acting on behalf of this organization and that the information contained within this application is accurate and complete.

Name	Date	Signature
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Appendix A

Complete the following information about each additional director and/or trustee.
Photocopy this Appendix as required.

Name of director or trustee (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> President <input type="checkbox"/> Vice-president <input type="checkbox"/> Treasurer <input type="checkbox"/> Secretary <input type="checkbox"/> Chair <input type="checkbox"/> Vice-chair <input type="checkbox"/> Director <input type="checkbox"/> Trustee <input type="checkbox"/> Board member <input type="checkbox"/> Other			
Date first elected to the board (YYYY-MM-DD)		Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)		Employer (confidential)
Occupation (confidential)		Date of birth of this board member (confidential) (YYYY-MM-DD)	

Name of director or trustee (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> President <input type="checkbox"/> Vice-president <input type="checkbox"/> Treasurer <input type="checkbox"/> Secretary <input type="checkbox"/> Chair <input type="checkbox"/> Vice-chair <input type="checkbox"/> Director <input type="checkbox"/> Trustee <input type="checkbox"/> Board member <input type="checkbox"/> Other			
Date first elected to the board (YYYY-MM-DD)		Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)		Employer (confidential)
Occupation (confidential)		Date of birth of this board member (confidential) (YYYY-MM-DD)	

Name of director or trustee (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> President <input type="checkbox"/> Vice-president <input type="checkbox"/> Treasurer <input type="checkbox"/> Secretary <input type="checkbox"/> Chair <input type="checkbox"/> Vice-chair <input type="checkbox"/> Director <input type="checkbox"/> Trustee <input type="checkbox"/> Board member <input type="checkbox"/> Other			
Date first elected to the board (YYYY-MM-DD)		Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)		Employer (confidential)
Occupation (confidential)		Date of birth of this board member (confidential) (YYYY-MM-DD)	

Note: If you added or deleted directors and/or trustees since your organization was first established, you are required to provide the documentary evidence of a change in directors and/or trustees (i. e. meeting minutes or documentation from the province) with this application for registration.

Appendix B

Complete the following information about each additional like official. Photocopy this Appendix as required.

Name of like official (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> CEO <input type="checkbox"/> Executive director <input type="checkbox"/> Spiritual leader <input type="checkbox"/> General manager <input type="checkbox"/> Other _____			
Date first elected to the board (YYYY-MM-DD)	Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)	
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)	Employer (confidential)	
Occupation (confidential)	Date of birth of this board member (confidential) (YYYY-MM-DD)		

Name of like official (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> CEO <input type="checkbox"/> Executive director <input type="checkbox"/> Spiritual leader <input type="checkbox"/> General manager <input type="checkbox"/> Other _____			
Date first elected to the board (YYYY-MM-DD)	Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)	
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)	Employer (confidential)	
Occupation (confidential)	Date of birth of this board member (confidential) (YYYY-MM-DD)		

Name of like official (Title, first name, last name)		Also known as:	
Role or position <input type="checkbox"/> CEO <input type="checkbox"/> Executive director <input type="checkbox"/> Spiritual leader <input type="checkbox"/> General manager <input type="checkbox"/> Other _____			
Date first elected to the board (YYYY-MM-DD)	Still active on the board? <input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what was the last day on the board? (YYYY-MM-DD)	
Residential address (confidential)			
City	Province/State	Postal Code/Zip Code	Country
Phone number (confidential)	Email address (confidential)	Employer (confidential)	
Occupation (confidential)	Date of birth of this board member (confidential) (YYYY-MM-DD)		

Appendix C

Complete the following information about each additional activity your organization will carry out to fulfill each of its purposes. Photocopy this Appendix as required. Failure to provide a complete description of all your organization's activities may result in denial of registration.

Activity:

Enter the name of the activity you will be doing. For example: Providing social or recreational activities to relieve the social isolation and loneliness of seniors; providing scholarships; operating an animal shelter.

Describe the activity, including information about what will be done, and how it will be carried out.

Provide as much detailed information as possible to allow the Charities Directorate to determine if the activities are charitable. Even if the organization is not yet in operation, it must describe its proposed activities in as much detail as possible. The courts have stated that charitable registration can be denied to organizations that do not provide enough information describing their current and/or proposed activities.

Large empty rectangular box with horizontal lines for describing the activity.

I have supporting documentation for this activity such as pamphlets, brochures, or other materials, which I will provide with this application for registration.

Is your organization carrying out this activity now? Yes No

If no, then what is the anticipated start date of the activity? (YYYY-MM):

Will another organization, partner, or intermediary help your organization carry out this activity?

For information, go to canada.ca/charities-giving, select "Guidance, videos, forms and more," then "Index of guidance products and policies," and see "Intermediaries (activities within Canada), CG-004."

Yes, and we have written agreements that we will provide with this application for registration Yes, and we do not have any written agreements No

