

## Application for Trust Account Number

### Who can apply for a trust account number?

The trustee (an individual or a trust institution that holds legal title to property in trust for the benefit of the beneficiaries) can apply for a trust account number. The trustee includes an executor, administrator, or liquidator who owns or controls property for some other person.

**Note**

This does not apply to a non-resident trust electing to file an income tax return under section 216 of the Income Tax Act.

### What information is needed?

To process your application, the Canada Revenue Agency (CRA) need a **completed and signed** Form T3APP, Application for Trust Account Number with a **signed copy** of the **trust document or last will and testament**.

**Note**

**Do not** attach Form T3APP to your T3RET, T3 Trust Income Tax and Information Return.

CRA will mail the trust account number to the trust. Include it on all correspondence for the trust.

### Authorizing a representative

You can authorize a representative by filling out Form T1013, Authorizing or Cancelling a Representative, and sending the form along with a completed and signed Form T3APP. Do not attach these forms to your T3RET, T3 Trust Income Tax and Information Return.

### Trust information

Enter the name of the trust, the name of the trustee, their phone number, and their full mailing address (city, province or territory, and postal code). If you want to use this mailing address for the trust, Check "Yes." Otherwise, enter the mailing address in **Representative contact information**.

Check the box that indicates your preferred language of correspondence.

If the trust is deemed to be resident in Canada, indicate in which country the trust is also considered resident.

### Representative contact information

Enter the name of the authorized representative (from Form T1013, Authorizing or Cancelling a Representative), along with their phone number.

Fill out the address area only if you want all CRA mail to go to your authorized representative.

### Signature and date

Print the name(s) of each trustee or corporate officer (if two or more trustees are acting jointly for the trust, each trustee must sign).

Joint trustees named in a trust agreement must each sign Form T3APP, or the CRA will not process the form.

### Trust creation date

For more information on types of trusts and your tax filing requirements, see Guide T4013, T3 Trust Guide.

### Testamentary trust

A testamentary trust is a trust or estate that is generally created on the day a person dies. The terms of the trust are established by the last will and testament or by a court order for the deceased individual's estate under provincial or territorial law.

### Inter vivos trust

An inter vivos trust is any trust that is not a testamentary trust. The date the trust was created corresponds to the effective date on the trust document.

### Methods for submitting your T3APP and related T3 trusts documents

#### How to send your application and documents online

You can send this form electronically through two of the CRA's secure portals, My Account and Represent a Client:

- Taxpayers have to log into My Account at **canada.ca/my-cra-account** to access the submit documents feature.
- Registered representatives can access the submit documents feature by logging into Represent a Client at **canada.ca/taxes-representatives**.

In My Account or Represent a Client, select "Submit documents" and the service will give you a picklist. From the picklist, select "Apply for a trust account number (Form T3APP)."

#### Where to send your application and documents by mail

If the trustee address is based in:	Send your application and documents to:
British Columbia; Nova Scotia; Sherbrooke, Quebec; or Laval, Quebec	<b>Sudbury Tax Centre</b> 1050 Notre Dame Ave Sudbury ON P3A 5C1
Any other Canadian location, international location, or for deemed residents	<b>Winnipeg Tax Centre</b> 66 Stapon Road Winnipeg MB R3C 3M2

### Do you need more information?

For more information, see Guide T4013, T3 Trust Guide, visit **canada.ca**, or call one of the following numbers:

- toll-free within Canada and the Continental U.S.A: **1-800-959-8281**
- from outside Canada and the Continental U.S.A, the CRA accepts collect calls by automated response at **613-940-849**. In a collect call, you may hear a beep and experience a normal connection delay

# T3 Application for Trust Account Number

**Important** – To process your application, we need a signed copy of the trust document or the last will and testament. If we do not receive either of these, we will not process the form.

<b>Trust information</b>		
Name of trust		For office use only T       -           -
Name of trustee		Telephone number
First name	Last name	
Mailing address of trustee		
City	Province or territory	Postal code 
Would you like to use the mailing address above for this trust? If <b>no</b> , fill out <b>Representative contact information</b> .		<input type="checkbox"/> Yes <input type="checkbox"/> No
Your language of correspondence:		<input type="checkbox"/> English <input type="checkbox"/> French
<b>Deemed resident</b> Is this a deemed resident trust? <input type="checkbox"/> Yes <input type="checkbox"/> No            If <b>yes</b> , please specify any other country in which it is also considered resident. _____		

<b>Representative contact information</b>		
Name of authorized representative (attach a signed copy of Form T1013). Fill out the address only if you want all CRA mail to go to your authorized representative.		
Mailing address of authorized representative		Telephone number
City	Province or territory	Postal code 

<b>Trust creation date</b>		
Was this trust created upon the death of an individual? If <b>yes</b> , complete the Testamentary trust section. If <b>no</b> , complete the Inter vivos trust section.		
<b>Testamentary trust</b>		
Date of death	Year          Month        Day	Social insurance number of the <b>deceased</b> 
<b>Inter vivos trust</b>		
Date trust was created	Year          Month        Day	<input type="checkbox"/> Non-profit organization - Business Number, if any: 

A signed copy of the trust document or will is attached <input type="checkbox"/> Yes <input type="checkbox"/> No    If <b>no</b> , provide an explanation _____
---

**Signature and date**

**Certification by trustee or corporate officer (if two or more trustees are acting jointly on the trust's behalf, each trustee must sign).**

**Important:** You must send a signed copy of the **legal document** (trust agreement or will) with your T3APP and Form T1013 (if the section **Representative contact information** of this form has been filled in).

I certify that the information given on this application and in any attached documents is correct and complete.

_____ (Print name)	_____ Title and Corporation name	_____ Trustee's or corporate officer's signature	_____ Date
_____ (Print name)	_____ Title and Corporation name	_____ Trustee's or corporate officer's signature	_____ Date
_____ (Print name)	_____ Title and Corporation name	_____ Trustee's or corporate officer's signature	_____ Date
_____ (Print name)	_____ Title and Corporation name	_____ Trustee's or corporate officer's signature	_____ Date