

## Bare Trust Intake Form

For more information on what constitutes a bare trust, please see our bare trust information sheet.

### Trustee(s) information

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

### Settlor(s) information

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

### Beneficiaries' information

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

Name \_\_\_\_\_  
SIN \_\_\_\_\_ Date of birth \_\_\_\_\_ (year/mm/dd)  
Address \_\_\_\_\_

### Trust Information

Trust Name \_\_\_\_\_  
Address \_\_\_\_\_  
CRA Trust Number \_\_\_\_\_\*\*  
Year of establishment \_\_\_\_\_ (year/mm/dd)

### Definitions

**Settlor:** Anyone who has contributed cash, property, assets to the trust at any time during the trusts life.

**Trustee(s):** an individual(s) or trust institution that holds legal title to property in trust for the benefit of the trust beneficiaries.

**Beneficiary:** includes the person(s) for whose benefit the trust is created, therefore the person(s) who has beneficial ownership.

### \*\* CRA Trust Number : How to Apply for one

You can apply for a trust account number with the CRA through your MyAccount. It will display your trust number after having completed the application process and that can be used to file the trust return.

We will also need to submit documentation that proves the bare trust arrangement exists. Depending on the bare trust arrangement applicable to you, the documents needed could vary. Please contact us to determine what additional documentation you should provide us.

#### *Confidentiality Acknowledgement*

*We acknowledge that information provided above pertaining to your role as the trustee, settlor, or beneficiary of this trust will be used for the sole purpose of trust filing requirements with the Canada Revenue Agency (CRA). This information will not be shared or used without your authorization or communication.*

*Bluenose Accounting*

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*Chartered Professional Accountants*