



Directors/Trustees and Like Officials Worksheet

Protected B when completed

You **must** give us complete information for each director/trustee and like official who, at any time during the fiscal period of this return, was a member of the charity's board of directors/trustees. Directors/trustees and like officials are persons who govern a registered charity. See the reverse for information on filling out this form.

Total number of directors/trustees and like officials:

Charity name:

Business number:

Return for fiscal period ending (YYYY/MM/DD):

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Note: If you would like these individuals to have the authority to communicate with the CRA on behalf of your charity, their name must also appear as an owner for your Business Number (BN). For more information, go to canada.ca/charities-giving, select "Operating a registered charity," then "Making a change to your organization" and see "Change director."

Public information				Confidential data							
Last name:		First name:		Initial:		Residential address – Street number and name:					
Term ▶ Start date (Y/M/D):		End date (Y/M/D):				City:		Prov/Terr:		Postal code:	
Position:		At arm's length with other Directors?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Phone number		Date of birth (Y/M/D):			
Last name:		First name:		Initial:		Residential address – Street number and name:					
Term ▶ Start date (Y/M/D):		End date (Y/M/D):				City:		Prov/Terr:		Postal code:	
Position:		At arm's length with other Directors?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Phone number		Date of birth (Y/M/D):			
Last name:		First name:		Initial:		Residential address – Street number and name:					
Term ▶ Start date (Y/M/D):		End date (Y/M/D):				City:		Prov/Terr:		Postal code:	
Position:		At arm's length with other Directors?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Phone number		Date of birth (Y/M/D):			
Last name:		First name:		Initial:		Residential address – Street number and name:					
Term ▶ Start date (Y/M/D):		End date (Y/M/D):				City:		Prov/Terr:		Postal code:	
Position:		At arm's length with other Directors?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Phone number		Date of birth (Y/M/D):			
Last name:		First name:		Initial:		Residential address – Street number and name:					
Term ▶ Start date (Y/M/D):		End date (Y/M/D):				City:		Prov/Terr:		Postal code:	
Position:		At arm's length with other Directors?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Phone number		Date of birth (Y/M/D):			
Last name:		First name:		Initial:		Residential address – Street number and name:					
Term ▶ Start date (Y/M/D):		End date (Y/M/D):				City:		Prov/Terr:		Postal code:	
Position:		At arm's length with other Directors?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Phone number		Date of birth (Y/M/D):			
Last name:		First name:		Initial:		Residential address – Street number and name:					
Term ▶ Start date (Y/M/D):		End date (Y/M/D):				City:		Prov/Terr:		Postal code:	
Position:		At arm's length with other Directors?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Phone number		Date of birth (Y/M/D):			
Last name:		First name:		Initial:		Residential address – Street number and name:					
Term ▶ Start date (Y/M/D):		End date (Y/M/D):				City:		Prov/Terr:		Postal code:	
Position:		At arm's length with other Directors?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Phone number		Date of birth (Y/M/D):			

Completing the Directors/Trustees and Like Officials Worksheet

Public information

Information from this column is available to the public.

Enter the last name, first name, and initial of the director/trustee or like official.

Term:

Start date: Enter the date the person started in the position.

End date: Enter the date the person left the position. If the person has not left the position, leave this field blank.

Position: Enter the title of the position being held. Each position is generally identified in an organization's governing documents (for example, president, treasurer, secretary). A registered charity may have other officials that have governing powers similar to those of a director or trustee. For example, a religious leader with some governing authority would be considered a like official.

At arm's length with other directors: Tick **Yes** if the person is at arm's length with all other directors/trustees or like officials.

At arm's length is a concept that describes a relationship in which two persons act independently of each other and are not related. Related persons are individuals who are related to each other by blood, marriage or common-law partnership, or adoption. It is also possible that individuals not related by a family connection, but by close business relations, may still be considered not at arm's length. For more information on arm's length, go to canada.ca/charities-giving, select "A to Z index of topics for charities," search for "Charities and giving glossary" and see "arm's length."

Confidential data

Information from this column will stay confidential and will not be made available to the public except in circumstances in which the release of any or all of the information is required by law or, in certain circumstances, permitted by law.

According to the Income Tax Act, circumstances in which the law requires or permits such information to be disclosed include a court order, warrant, or subpoena issued for a criminal proceeding under an act of Parliament or a legal proceeding relating to the administration or enforcement of the Income Tax Act, the Canada Pension Plan, the Unemployment Insurance Act, or the Employment Insurance Act, or any other act of Parliament or law of a province that allows a tax or duty to be imposed or collected.

Other circumstances in which we are required or permitted by law to disclose certain records include a request made under the authority of the Auditor General Act, a warrant issued by the Canadian Security Intelligence Service Act, and enquiries from the Department of Finance Canada for information to form or evaluate fiscal policy.

Residential address: In the proper spaces, enter the full home address, including the street number, street name, city (which could be a town, village, or other municipality), province or territory, and postal code of each director/trustee or like official.

Phone number: Enter the telephone number at which the person can be reached during the day.

Date of birth: Enter the person's date of birth so that the CRA is better able to identify the individuals who are responsible for managing the charity.

If the director/trustee or like official lives outside the country, enter the person's full mailing address, including the country.