



Place bar code label here

Enter the prescribed information for each director/trustee and like official of the charity's board of directors/trustees. The Canada Revenue Agency makes the public information section on this worksheet available to the public. All of the information collected on this form, including the confidential data, may be shared as permitted by law (e.g. with certain other government departments and agencies). See the reverse of this form for an explanation of terms used.

Total Number of Directors/Trustees and Like Officials:

| Public Information                                 |  |  | Confidential Data |  |   |              |
|--|--|--|-------------------|--|---|--------------|
| Last name:   |  | First name:  | Initial:          | Home address – Street number and name: |   |              |
| Director/Trustee/Like Officials Term ▶ Start Date: |  | End Date:  | City:             |  | Prov/Terr:                                    | Postal Code: |
| Position:  |  | At arm's length with other Directors, etc.? <input type="checkbox"/> Yes <input type="checkbox"/> No | Telephone Number: |  | Date of Birth (mandatory for identification): |              |
| Last name:   |  | First name:  | Initial:          | Home address – Street number and name: |   |              |
| Director/Trustee/Like Officials Term ▶ Start Date: |  | End Date:  | City:             |  | Prov/Terr:                                    | Postal Code: |
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| Director/Trustee/Like Officials Term ▶ Start Date: |  | End Date:  | City:             |  | Prov/Terr:                                    | Postal Code: |
| Position:  |  | At arm's length with other Directors, etc.? <input type="checkbox"/> Yes <input type="checkbox"/> No | Telephone Number: |  | Date of Birth (mandatory for identification): |              |

## COMPLETING THE DIRECTORS/TRUSTEES/LIKE OFFICIALS WORKSHEET

You **must** provide the last name, first name, and initial of each director/trustee and like official, his/her home address (including street number, street name, city, province or territory, and postal code), telephone number, position in the charity, the start date and end date of the term, whether or not he/she was at arm's length from all other members of the governing board, and his/her date of birth.

- **What if one or more of the directors/trustees/like officials did not complete a full term or their term ended before the end of the fiscal year?**

This worksheet now asks for the start date and end date of the term for each director/trustee or like official. If the terms of the directors/trustees/like officials do not coincide with the fiscal year of the charity, or a director/trustee/like official does not complete their term, this should be indicated on the worksheet. If the terms of the directors/trustees/like officials do coincide with the charity's fiscal year, then the fiscal year start and end should be recorded as each director's term. Regardless of the term length, a charity must ensure that complete information is provided for each person who served as a director/trustee or like official for any period of time during the fiscal period.

- **Why do I need to provide my date of birth?**

Providing the date of birth for each director/trustee/like official is mandatory. Requesting dates of birth provides the CRA with a means of identifying, with certainty, the directors/trustees/like officials who are responsible for managing a charity. Only a director's name, position in the charity, and arm's length status to other directors/trustees/like officials will become public information. Other information, including date of birth, is not part of the public portion of the *Registered Charity Information Return* and will be kept confidential.

- **Who is a Director/trustee or like official?**

Directors/trustees and like officials are persons who govern a registered charity as members of the board of directors or a similar type body. These persons hold positions that are usually identified in an organization's governing document (e.g., president, treasurer and secretary). A registered charity may have other officials that have governing powers similar to a director or trustee. For example, religious leaders often have some governing authority and would be considered as like officials.

- **When would two directors/trustees/like officials be "not at arm's length"?**

The term "at arm's length" describes a relationship where persons act independently of each other or who are not related. Two individuals are "not at arm's length" when (1) they perform their duties in concert without separate interests (e.g., business partners) or (2) they are related. Related persons are individuals who are related to each other by blood, marriage or common law partnership, or adoption. Examples of related persons who are "not at arm's length" are:

### Non-arm's length relationships

