

## CHECKLIST OF DOCUMENTS NEEDED WITH YOUR RESPONSE TO CRA

1. Copy of T5003 Statement of Tax Shelter issued by Global Learning Group Inc. for the Global Learning Gifting Initiative 2009 tax shelter.
2. Copy of your cheque to Glooscap Heritage Society AND to the Escrow Agent Inc. If you do not have these cheques, you can ask your bank for copies.
3. Copy of your Assignment of Licences.
4. Copy of Direction ONE to escrow agent.
5. Copy of Direction TWO to escrow agent.
6. Copy of Deed of Gift of Property with attached Schedule A – list of courseware
7. Copy of email from EscrowAgent Inc. informing you of the Global Learning Trust (2004) notification that you were approved as a beneficiary and its declaration of distribution of property to you. This is called the **Approval** document on the [www.glginitiative.ca](http://www.glginitiative.ca) website.

If you e-filed and have not already provided:

8. Copy of your official tax receipts from Glooscap Heritage Society and Malvern Rouge Valley Youth Services, **unless you paper-filed and already provided this.**

These back up documents are available on your personal electronic files sent from the EscrowAgent Inc ([notices@escrowagent.ca](mailto:notices@escrowagent.ca)). An email was sent to you recently containing your user id and password. Once you log on, you should see a screen similar to this:

### Document list:

- (2009) [4XXXX 4XXXXX SchA 1XX Acknowledgement.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Application.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Approval.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Assignment.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Cheques.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Deed Of Gift Cash.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Deed Of Gift Property.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Direction1.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Direction2.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Prior Receipt.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Waiver.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Receipt Cash 036892.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX Receipt GIK 048351.pdf](#)
- (2009) [4XXXX 4XXXXX SchA 1XX T5003.pdf](#)
- [>>> Other Related Documents](#)

**Please note :** As the Donor Database is currently being upgraded, the documentation required on this checklist will not be available at this time. Please refer to the Sample Suggested Response Template for further instructions. We apologize for any inconvenience this may have caused.