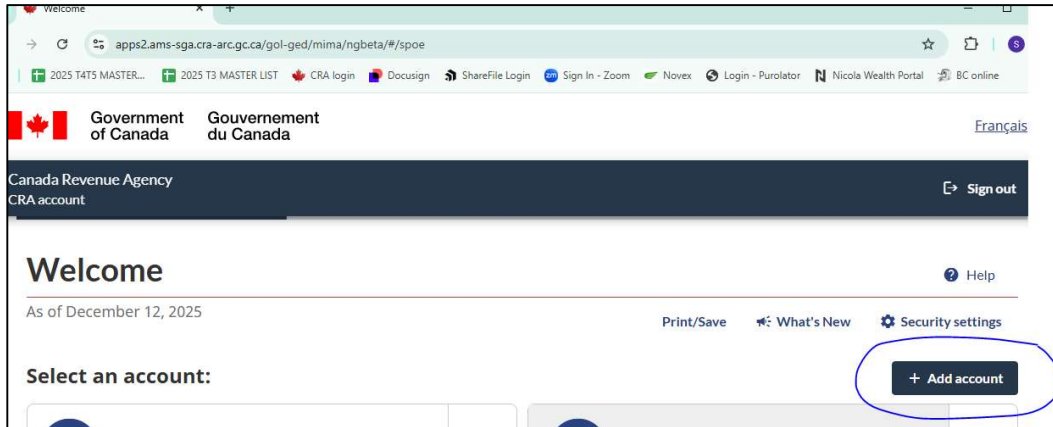


Setting up My Trust Account with CRA

Register for online access as a primary trustee

Before accessing My Trust Account, a primary trustee must add or access Represent a Client. First time users will be prompted to create a ReplD. This can be done after logging in to your CRA account and choosing "Add account".



Once the primary trustee has accessed Represent a Client and has a ReplD, they must:

1. Select **Authorization request** (left side bar)
2. Choose their **RAC identifier** (ReplD) from the drop down menu
3. Select **Primary Trustee registration**
4. Provide information about the trust account as part of an enhanced validation process:
 - a. Trust number
 - b. Trust name
 - c. Address on file
 - d. Type of trust

After being confirmed as the primary trustee of the account, you will receive immediate access to My Trust Account which you can access from the Represent a Client Welcome page.

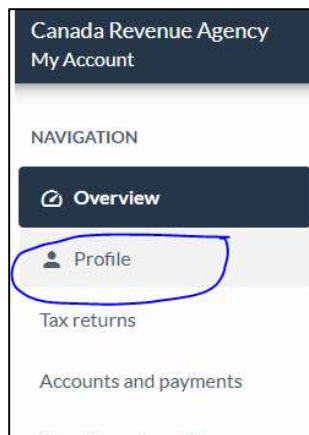
Get access through Represent a Client

My Trust Account is **only** accessible through Represent a Client in your CRA account.

1. [Sign in to your CRA account](#)
2. Select your representative account from the Welcome page to access Represent a Client
3. Enter your Trust number and select **Access T3**

Provide authorization to GBCo

1. After logging in to the Trust account, select **Profile** from the left side bar.



2. Scroll down to the right side of the screen and click on **View Authorized Representatives**
3. Click on **Authorize new representative** then **Start**
4. Enter GBCo's BN (business number) **123041204** and click on **Search**
5. GBCo's information will show up. Click on **Next**

The following representative has been identified:

Representative information	
Name:	GALLOWAY BOTTESELLE & COMPANY
BN:	123041204
Phone number:	6047366581
Fax number:	604-736-0152

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6. Select **Level 2** access, **YES** to Online access and **check the box** for “Does not expire”. Then click **Next**

2 Select authorization details

Fields marked with an asterisk (*) are required.

*** Authorization level**

☐ **Level 1** - Allow your representative access to information only.

☒ **Level 2** - Allow your representative access to information and to make certain account changes.

> Level 1

> Level 2

*** Online access**

Online access allows a representative to deal with the Canada Revenue Agency by internet, by telephone, by fax, in person or in writing.

☒ Yes

☐ No

*** Expiry date**

YYYY - MM - DD

☒ Does not expire

7. Check the confirmation box and click on **Submit**

*** Confirmation**

☒ I confirm that the CRA may deal directly with the above named representative for the specified level of authorization. I acknowledge that these activities may occur without the CRA advising me.

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