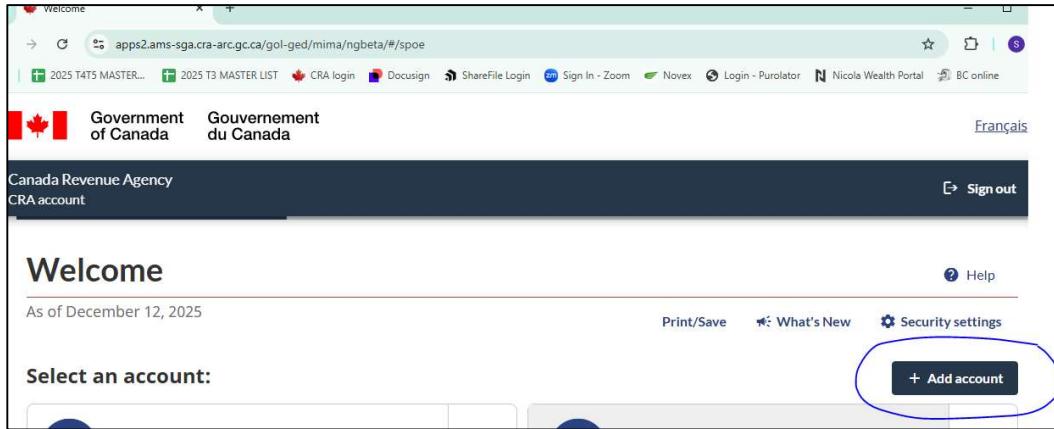


# Setting up My Trust Account with CRA

## 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 RePID. 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 RePID, they must:

1. Select **Authorization request** (left side bar)
2. Choose their **RAC identifier** (RePID) 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.

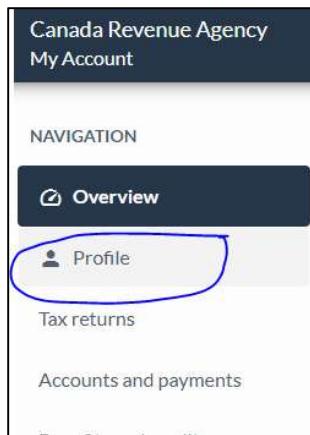
## Get access through Represent a Client

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:	
<b>Representative information</b>	
<b>Name:</b>	GALLOWAY BOTTESELLE & COMPANY
<b>BN:</b>	123041204
<b>Phone number:</b>	6047366581
<b>Fax number:</b>	604-736-0152
<b>Back</b>	<b>Next</b>

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.

[Back](#) **Submit**