

Canada Revenue Agency Trust Authorization Guide



1. First, you will need to have a CRA MyAccount to begin the process. Instructions on how to obtain a CRA MyAccount (if you do not currently have one), can be found here: <https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services/register-cra-sign-in-services.html>
2. You must sign into CRA Represent a Client here: <https://www.canada.ca/en/revenue-agency/services/e-services/represent-a-client.html>
3. If you do not have a CRA RepID, you will have to create a RepID, which can be done by clicking on CRA register under Option 2 when going to the above link (see screenshot below).

A screenshot of the CRA login interface. At the top, it says "Option 2 - Using a CRA user ID and password". Below that, it says "Sign in with your CRA user ID and password, or register." There are two buttons: a green button labeled "CRA sign in" and a blue link labeled "CRA register".

4. Once you receive the RepID you then have to go back and login into CRA Represent a Client. Once logged in you would select "Authorization request" on the left hand side of the page (See screenshot below)

A screenshot of the "Represent a Client" menu. The menu is open, showing four options: "Represent a Client" (which is the active menu item), "Review and update", "Submit documents", and "Authorization request".

5. You then want to select your RepID from the dropdown menu and choose trust client at the bottom (see screenshot below) and then click submit

Authorization Request

Select the representative identifier that the client is authorizing.

* List of representative identifiers (required)

* Select a client type to submit an authorization request. (required)

- Individual client
- Business client
- Trust client

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6. On the next page you will then have to select “primary trustee registration” at the bottom of the page (see screenshot below). There will be some information about the trust you have to provide to validate you are the trustee of the trust. Please let us know if you need any information from us in relation to this. We are not certain the information they will request, however it will likely be information from the most recent tax return filed for the trust.

Add authorization for individual

Add authorization for trust

Primary trustee registration

7. Once you are confirmed as the primary trustee, you should then receive online access to the MyTrust Account.
8. Now you can log into CRA Represent a Client here:
<https://www.canada.ca/en/revenue-agency/services/e-services/represent-a-client.html>
9. Enter your Trust Number and select Access T3

*** T3**

1 alpha, 8 digits

Access T3

10. Once logged in, go to your Profile at the top right



11. Scroll down until you find the Authorized Representatives section and select Manage authorized representative.



12. Select Authorize a new representative

Authorize a new representative

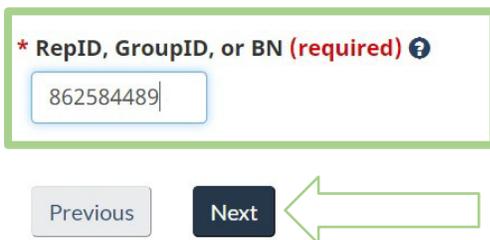
To authorize a representative select the button below.

- To authorize an employee, an individual, or an individual of a firm, you need the representative identification number (RepID) they obtained through "Represent a Client" on the Canada Revenue Agency (CRA) Web site.
- To authorize a firm, you need their Business Number (BN), which they must have registered through "Represent a Client" on the CRA Web site.
- To authorize a group, you need the group identification number (GroupID) they obtained through "Represent a Client" on the CRA Web site.



13. Enter Hendry Warren's business number (shown in the screenshot below) and hit next

This representative will have access to all tax years since this online service does not give you the option to specify a year.



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14. Confirm you see Hendry Warren LLP in firm name and fill out the authorization questions

- a. Update and view (Level 2)
- b. Do not enter an expiry
- c. Select all accounts
- d. Hit Next

Firm BN 862584489
Firm name HENDRY WARREN LLP

*** Level of authorization for this representative (required)** ⓘ

- View only (level 1)
- Update and view (level 2)

Expiry date

(If no expiry date is selected, the authorization will be valid indefinitely.)

 ⓘ

15. Review the information and tick the confirm authorization box and hit submit. You are done. Hendry Warren will now be authorized on your account.