CRA Representative Authorization
Step-by-Step Guide

STEP 1 - REGISTER FOR CRA MY PERSONAL ACCOUNT *(only if you are not already registered for CRA My Account)*

If you are not already registered for **My Account** you must do so and enable email notifications before we submit your authorization request.

1) If you do not have a CRA user ID and password, you will need to create one. To do so, you will need the following:
   - a) Social insurance number
   - b) Date of birth
   - c) Current postal or zip code
   - d) Personal Income tax returns from the current and previous year
   - e) Business number

2) Click on **My Account.**

3) Sign in or register.
   - a) **Option 1 -** Click on **Sign-In Partner** - This allows you to sign in with a Sign-In Partner (financial institutions).
   - b) **Option 2** - Click on **CRA Register** - Allows you to register with a username and password.

4) Validate your identity with the information from point 1).

5) Once you have registered, you will need to add your business number to your account. You will only be allowed to complete this step if you name and social insurance number matches the information the CRA has on file for the business. If you get an error message at this step, contact the CRA to update their records.

6) Ensure that you have your email notifications enabled.

Note: *You may be signed out and need to sign back in.*

For more information on My Account Registration Process, visit **CRA's website.**

**PWM Tax & Accounting Services is not related to and is an independent third-party business from PWM Financial Services Inc. and PWM Private Wealth Counsel.*

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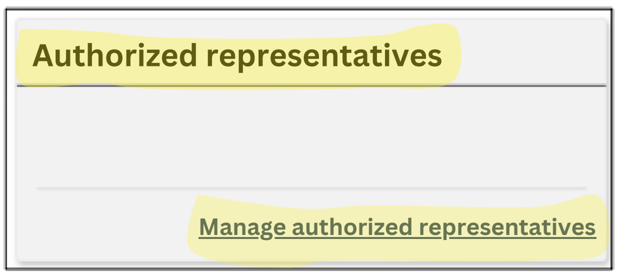
STEP 2 - MANUALLY ADDING PWM TAX & ACCOUNTING SERVICES AS AN AUTHORIZED REPRESENTATIVE

If the request has expired and/or you would like to give access prior to the filling of an authorization form, you can do the following:

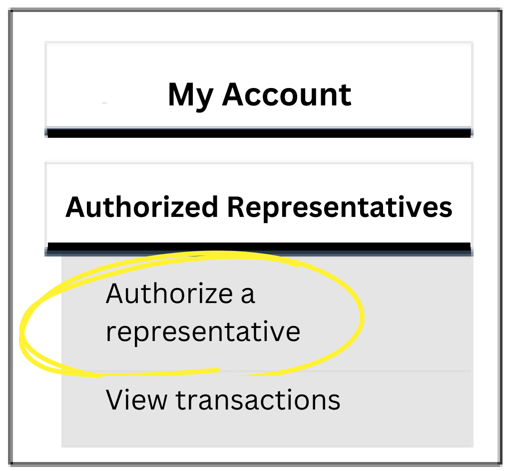
1) Sign into **My Account** using Option 1 or 2.

2) Select **"Profile"** at the top of the page.

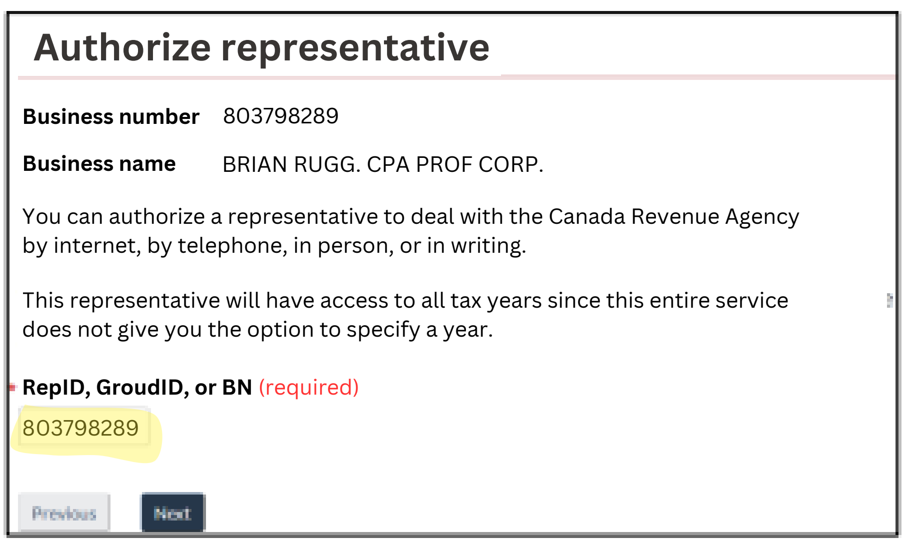
3) Scroll down to the Authorized Representatives section and click on **"Manage Authorized Representatives".**



4) Click on **"Authorize a Representative".**



5) Add Brian Rugg. CPA Prof. Corp. business number: **803798289.**



**Brian Rugg CPA Prof. Corp. is operated as PWM Tax & Accounting Services*

PWM
Tax & Accounting Services

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6) Enter the authorization - **Level 2,** expiry date - **None,** and select **All Accounts.**

Authorize representative - Enter information

Business number 803798289
Business name BRIAN RUGG. CPA PROF. CORP.
RepID
Representative names

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

- View only (level 1)
- Update and view (level 2)
- Delegate authority, update and view (level 3)

Expiry date
(if no expiry date is selected the authorization will be valid indefinitely.)

yyyy-mm-dd

* Accounts this representative will be authorized to access *(select one or more)* *(required)*

Select	Accounts
☑	All accounts
☐	All RC Corporation Income Tax Accounts
☐	RC0001
☐	All RP Payroll Deductions accounts
☐	RP0001

Previous Next

7) Validate the information, check the Confirmation box and click submit.

Review authorized representative

Business number 803798289
Business name BRIAN RUGG. CPA PROF. CORP.
RepID
Representative names

Authorization information

Program account(s)	Level of Authorization	Tax year(s)	Expiry Date
All accounts	Update and view (level 2)	All years	Does not expire

Confirmation (required)
☐ I confirm that the Canada Revenue Agency (CRA) can deal directly with this representative on my behalf.

Previous Submit