



Authorize a Representative for Offline Access

Representatives

For online access to your client's information, do **not** complete this form. Instead, go to canada.ca/cra-login-services and sign in to Represent a Client.

Individuals and business owners

If you are a Canadian individual or business, you can **view, add, or modify an authorized representative online** using our online services at canada.ca/cra-login-services.

Use this form to authorize a representative to communicate on your behalf with the Canada Revenue Agency (CRA) using only offline access (by phone, fax, mail, or in person) for several types of accounts. For more information, see **When to use this form** on page 3.

Step 1 – Account information

Use this section to identify all of the accounts you want the representative to access. Provide **both** the account number and name for each account.

SIN, TTN, or ITN First name Last name

Trust account number Trust name

Non-resident account number Non-resident account name

If you identified a non-resident account number and have an associated CRA identifier, please provide it here:

Other CRA identifier* Type of CRA identifier (SIN, TTN, ITN, trust account number, or business number)
_____ SIN _____

* Note that providing your other CRA identifier will not provide authorization for that account.

Business number Business name

If you provided a business number, choose **one** of the following **business options**:

Option 1 – Give access to **all** my business number program accounts

Option 2 – Give access to **specific** business number program accounts

For a **list of supported program identifiers**, see page 3.

Program identifier **All reference numbers** **A specific reference number**
(two letters) numbers (four digits)

N / or _____

N / or _____

Step 2 – Representative information

Choose **one** of the following options and fill in the required information:

Option 1 – I am authorizing an **individual**

First name Last name Telephone number Extension

Option 2 – I am authorizing a **firm**

Firm name Telephone number Extension

Long-Haggerty Chartered Professional Accountant Inc. 250-770-0184 _____

Step 3 – Level of access

Choose **one** of the following levels:

Level 1 – Allow access to information only

We can disclose information about your account to your representative.

Level 2 – Allow access to information and to make certain account changes

We can disclose information about your account to your representative, and they can request to make certain changes on your account.

Step 4 – Authorization expiry date

If you want this authorization to expire, provide an expiry date.

Expiry date (YYYYMMDD): (optional)

Note: If there is no expiry date, the authorization will remain until you or someone with signing authority changes or cancels it.

Step 5 – Certification

You must have signing authority for the accounts identified in **Step 1**. We may contact you for more information.

Choose the appropriate option:

- I am the:**
- taxpayer
 - parent or legal guardian of a taxpayer under the age of 16
 - legal representative (such as the executor, power of attorney, or trustee)
 - owner (such as the sole proprietor, or a partner of a partnership)
 - officer of a non-profit organization
 - corporate director or corporate officer
 - individual with delegated authority for the business account

We will not process this form if your name does not match the one in our records. To avoid processing delays, verify that we have complete and valid information on file for you **before** signing this form.

First name

Last name

Telephone number

I certify that the information given on this form is correct and complete.

Signature: _____

Date (YYYYMMDD):

Once completed, **send this form to your tax centre** within **six months** of the date you signed it or we will not process it. For more information, see page 4.

Personal information (including the SIN) is collected and used to administer or enforce the Income Tax Act and related programs and activities including administering tax, benefits, audit, compliance, and collection. The information collected may be disclosed to other federal, provincial, territorial, aboriginal or foreign government institutions to the extent authorized by law. Failure to provide this information may result in paying interest or penalties, or in other actions. Under the Privacy Act, individuals have a right of protection, access to and correction of their personal information, or to file a complaint with the Privacy Commissioner of Canada regarding the handling of their personal information. Refer to Personal Information Bank CRA PPU 005, CRA PPU 015, CRA PPU 047, CRA PPU 063, CRA PPU 094, CRA PPU 140, CRA PPU 165, CRA PPU 178, CRA PPU 218, CRA PPU 223, CRA PPU 224, CRA PPU 231, CRA PPU 232, CRA PPU 233, CRA PPU 234 and CRA PPU 235 on Information about Programs and Information Holdings at canada.ca/cra-information-about-programs.