How to Authorize a Representative for my Personal tax account?

STEP 1: register for a My Account
You can use one of two methods:

1. You can use a bank sign in partner *if you already have online banking access* with one of the following banks:

Affinity Credit Union
ATB Financial
BMO Bank of Montreal
CIBC
Caisse Alliance
Coast Capital
Conexus Credit Union
Desjardins
Libro Credit Union
National Bank
RBC Royal Bank
Scotiabank
Servus Credit Union
Simplii Financial
Tangerine
TD Canada Trust
Uni
Vancity

2. Set up a CRA login account. This is a two-step process:
Set up a My Account for Individuals
https://www.canada.ca/en/revenue-agency/services/e-services/e-services-individuals/account-individuals.html
We recommend saving this as a bookmark in your web browser. You can also search for "CRA login".)

Enter you SIN
Enter the postal code that CRA has on your file
Enter your date of birth
Have your last 2 years of personal tax returns available to answer a security question from your taxes
Create a CRA User ID and password (passwords have restrictions and should be unique – no repeats)
Set up security questions and answers
Enroll in multi-factor authentication (generally with your cell phone)
CRA will mail you a security code to your mailing address that they have on file

WAIT for Canada Post
When you receive the security code, return to the link above. Choose Option 2 CRA sign in and log in
Enter the CRA security code from the letter
Click to sign up your email
Enter your email address
You can skip the step to sign up for electronic mail
There are three options for additional notifications: Information slips, Submitting documents and Uncashed cheques. Choose the options you prefer.
Agree to the Terms and Submit

STEP 2: Authorize a Representative
After you are in and can see your personal information:
Go to Profile on the left side
Find the box for Authorized representatives
Click on the +Add sign
Enter our business number: **887783611**
Choose Authorization level as **Level 2**
Say **Yes** to Online access
Leave the **Expiry Date blank**
Confirm the authorization
If there are old authorizations, you can Edit and Delete any old ones.

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