Authorizing or Cancelling a Representative

You can view, add, modify, or cancel your authorized representatives online using **My Account** at **canada.ca/my-cra-account**. Your representative will have **instant** access to your information and online services to easily manage your account. To **immediately cancel** a representative, call us at **1-800-959-8281**.

Part 1 – Taxpayer account information

Complete the line that applies.

SIN, TTN or ITN	First name	Last name

Trust account number	Trust name
T	

Part 2 – Representative information and authorization

Complete section A **or** B, as applicable.

A. Authorize online access for all tax years (including access by telephone and in writing)

Your representative must be registered with Represent a Client to obtain online access.

RepID ____________ **First name**: ____________ **Last name**: ____________

GroupID G ____________ **Group name**: ____________

Business Number (BN) 815270160 **Business name**: Bayswater Tax Services Inc.

Level of authorization (level 1 or 2): 2 **Telephone**: - -

B. Authorize access by telephone and in writing

First name: ____________ **Last name**: ____________

Business name: ____________

Telephone: - - **Ext**: ______ **Fax**: - -

Tick the appropriate box and indicate the level of authorization:

☐ All tax years (past, present, and future) **Level of authorization** (level 1 or 2): ______

or

☐ Specific tax year(s) with level of authorization (level 1 or level 2) indicated for **each** tax year.

Tax year(s)										
Level of authorization										

Part 3 – Authorization expiry date

Enter an expiry date, if applicable. Your representative's access to your information will stay in effect until **you** or **your representative** cancel it, or we are notified of your death.

Year Month Day ____________

Canada

Part 4 – Cancel your representative

Complete this section to cancel your representative(s) and remove their access to your information. Tick the appropriate box.

☐ Cancel **all** representatives.

or

☐ Cancel the representative listed below:

RepID ________________ **First name**: ____________________ **Last name**: ____________________

GroupID G________________

Business Number (BN) ____________________ **Business name**: ____

Part 5 – Signature and date

If you are the **taxpayer**, you must **sign** and **date** this form.
If you are the **legal representative**, you must **tick** the box below, **sign** and **date** this form.

☐ **I am the legal representative for this taxpayer or estate/trust**
(executor, administrator, power of attorney, legal guardian or parent of a taxpayer under the age of 16, or trustee).
Important: If you haven't already done so, you must send a **complete** copy of the **legal document** giving you the authority to act in this capacity. If the taxpayer is under the age of 16, no legal document is required.

____ ( ) -____________
Name of taxpayer or legal representative | Signee's telephone number

Year Month Day

X ______________________________________ ________________
Signature of taxpayer or legal representative | Date of signature

The CRA must receive this form within 6 months of the date it was signed, or it will not be processed.

Personal information is collected under the Income Tax Act to administer tax, benefits, and related programs. It may also be used for any purpose related to the enforcement of the Act such as audit, compliance and collection activities. It may be shared or verified with other federal, provincial, territorial or foreign government institutions to the extent authorized by law. Failure to provide this information may result in interest payable, penalties or other actions. The social insurance number is collected under section 237 of the Act and is used for identification purposes. Under the Privacy Act, individuals have the right to access, or request 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 063, CRA PPU 140, CRA PPU 178 and CRA PPU 218 at **canada.ca/cra-info-source**.

Representatives	Individuals
Get access to your clients' information faster online using "Represent a Client." Go to canada.ca/cra-login-services and log in. On the "Welcome" page, select "Authorization request".	**Give your representative instant** access to your information online using "My Account." Go to **canada.ca/cra-login-services** and log in. On the "Welcome" page, select "Authorize my representative".

Why do you need to complete this form?

As an individual or trust, your account information is confidential. You need to complete this form if you want the Canada Revenue Agency (CRA) to deal with another person (such as your spouse or common-law partner, other family member, friend, or accountant) who would act as your representative for income tax matters.

You or **your legal representative** must complete and sign this form.

The CRA will process completed forms only.

What is a legal representative?

A **legal representative** is an executor or administrator of the taxpayer's estate, someone with a power of attorney, guardian, or trustee or custodian for trust accounts. That person does not need to complete this form to be updated as a legal representative on the taxpayer's account, but he or she must send a **complete** copy of the **legal document** giving him or her the authority to act in that capacity to the appropriate tax centre.

Can you use this form for your business accounts?

No. For business number accounts, use Form RC59, Business consent for offline access.

Authorizing a representative

When you authorize a representative, you are letting that person represent you for income tax matters at the level of authorization you specify, for the tax year or years you indicate. Income tax matters include issues related to information on your tax return.

If your representative contacts us, we will ask him or her for identification. After we confirm your representative's identity and that he or she is listed as your representative on your account, we will ask for specific information relating to any of the following:

- your name, address, date of birth, and social insurance number
- your notice of assessment or notice of reassessment
- your tax return
- other tax documents

You can authorize more than one representative. However, you must complete a **separate Form T1013** for each account and representative.

You can add or change information about an existing representative through **My Account** at **canada.ca/my-cra-account** or by completing a new Form T1013.

Part 1 – Taxpayer account information

Enter your account number and your name. If you are an individual, enter either your social insurance number (SIN), temporary tax number (TTN), or individual tax number (ITN). Otherwise, enter your trust account number.

Part 2 – Representative information and authorization

Section A – Authorize online access for all tax years (if registered in Represent a Client)

By completing Section A, you are authorizing your representative to deal with the CRA through our **online** services, by **telephone** and in **writing**. Your representative will have access to all tax years online.

For trust accounts, your representative will have access to all tax years available to them but with no online access.

If you have a "care of" address on your account, we will send you a letter asking you to call the CRA to authorize the online access. To avoid a delay, use **My Account's** "Authorize my representative".

Section B – Authorize access by telephone and in writing

By completing Section B, you are authorizing your representative to deal with the CRA only by **telephone** and in **writing**.

Levels of authorization

There are 2 levels of authorization. These levels control the amount of access your representative gets.

> **Note**
> If you do not specify a level of authorization, **we will assign level 1**.

Level 1 - Disclose

Your representative can make payment arrangements for you. We may also disclose information to your representative such as:

- information given on your T1 Income Tax and Benefit Return or your T3 Trust Income Tax and Information Return
- adjustments to your T1 Income Tax and Benefit Return or your T3 Trust Income Tax and Information Return
- information about your registered retirement savings plan, Home Buyers' Plan, tax-free savings account and Lifelong Learning Plan
- your accounting information, including balances, payment on filing, and instalments or transfers
- information about your CRA-administered benefits and credits (Canada child benefit, goods and services tax/harmonized sales tax credit, and working income tax benefit)
- your marital status (but not information related to your spouse or common-law partner)

Level 2 - Disclose and request changes
We may disclose the information listed in level 1 and allow changes to your return(s) and your account, including:

- adjustments to:
  – income
  – deductions
  – non-refundable tax credits
- accounting transfers.

Your representative can request remittance vouchers for you.

Your representative can submit a request for taxpayer relief or file a notice of objection or an appeal for you.

Your representative **will not be allowed** to change any of the following:

- address
- marital status
- direct deposit information or
- pre-authorized debit agreement

Part 3 – Authorization expiry date

Enter an expiry date for the authorization given in Section A **or** B of Part 2 if you want the authorization to end at a particular time.

Part 4 – Cancel your representative(s)

You can cancel your representative(s) using **My Account** at **canada.ca/my-cra-account**, by calling **1-800-959-8281**, or by completing parts 1, 4, and 5 of this form. An authorization stays in effect until you cancel it, it reaches the expiry date you choose, or we are notified of your death.

Your representative can also immediately cancel their own authorization using **Represent a client** at **canada.ca/taxesrepresentatives,** or by making a request by telephone or in writing.

To cancel more than one representative, but not all representatives, attach another sheet.

Part 5 – Signature and date

To protect your confidential tax information, we will not accept or act on any information given on this form unless **you** or a **legal representative** has signed and dated this form.

Your responsibilities

It is your responsibility to monitor and understand the transactions your representative completes on your behalf, and to make sure that the information for your representative is current. You can view your transactions using **My Account**.

The CRA often adds new online services that your representative can access. It is your responsibility to review these services and decide if your representative should still be authorized to represent you. **If you feel your representative is not acting in your best interest, you should immediately remove their access to your information**.

For a list of available services, go to **canada.ca/taxesrepresentatives.**

Where do you send your completed form?

Send the completed form to your CRA tax centre at the address listed below. If you are not sure which tax centre is yours, go to **canada.ca/cra-offices,** or look on your most recent notice of assessment or notice of reassessment.

If your tax services office is in:	Send your form to:
Alberta, British Columbia, Hamilton, Kitchener/Waterloo, London, Manitoba, Northwest Territories, Saskatchewan, Thunder Bay, Windsor, or Yukon	**Winnipeg Tax Centre** Post Office Box 14000, Station Main Winnipeg MB R3C 3M2
Barrie, Belleville, Kingston, Montréal, New Brunswick, Newfoundland and Labrador, Nova Scotia, Nunavut, Ottawa, Outaouais, Peterborough, Prince Edward Island, Sherbrooke, St. Catharines, Sudbury, or Toronto	**Sudbury Tax Centre** Post Office Box 20000, Station A Sudbury ON P3A 5C1
Chicoutimi, Laval, Montérégie-Rive-Sud, Québec, Rimouski, Rouyn-Noranda, or Trois-Rivières	**Jonquière Tax Centre** 2251 René-Lévesque Boulevard Jonquière QC G7S 5J2

For trust accounts:

If the trustee resides in:	Send your form to:
British Columbia; Nova Scotia; Sherbrooke, Quebec; or Laval, Quebec	**Sudbury Tax Centre** Post Office Box 20000, Station A Sudbury ON P3A 5C1
Any other Canadian or international location, or for deemed residents	**Winnipeg Tax Centre** Post Office Box 14000, Station Main Winnipeg MB R3C 3M2

Service standard for processing this form

We aim to process this paper form within 4 weeks from the date it is received by the CRA.

Do you need more information?

If you have questions about how to complete this form, call **1-800-959-8281**.

Teletypewriter (TTY) users
TTY users can call **1-800-665-0354** for bilingual assistance during regular business hours.