# Step 3 – Optional: Provide CRA Access

This step is optional but can make things easier. It allows us to collect tax documents directly from CRA so you do not need to find and send them. If you do choose to send them, they <u>must have your name on each document and contain all pages</u>.

## Step 1 – Log in to your CRA account.

## Step 2 – Click "**Profile.**"

On a phone, open the menu and select "**Profile.**"

## Step 3 – Go to "Authorized representative(s)" and click "**+ Add**."

## Step 4 – Click "**Start.**"

- Enter RepID: **3SN4XX8 and** Click "Search."
- If you see my name and phone number, click "Next."
- Choose **Authorization Level 1**.
- Select "**Yes**" for Online Access.
- Leave the expiry date blank.
- Click "**Next**."
- You will see a confirmation page.
- Check the box that says "**I Confirm**" and click "**Submit.**"
- Once done, **<u>please let me know so I can confirm access.</u>**

You can remove my access at any time by returning to the same section and deleting me. Many clients choose to keep access active so we can easily collect documents in the future or provide them to your accountant or financial planner if needed.