Clear Data Help

Canada Revenue Agency | Agence du revenu du Canada

Authorizing or Cancelling a Representative

Why do you need to complete this form?

As an individual, trust or T5 filer, 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.

The CRA will process completed forms only; incomplete forms will not be processed.

You must complete and sign this form or it must be signed by a **legal representative** (read "What is a legal representative?" on this page).

Can you use this form for your business accounts?

No. For business number accounts, use Form RC59, *Business Consent*.

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 your 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.

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.

For security reasons, if your representative contacts or visits 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:

- your notice of assessment, notice of reassessment, or other tax documents; or
- the contents of your tax return.

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

You can authorize or cancel a representative by providing the requested information online through "**Authorize my representative**" at **www.cra.gc.ca/myaccount**.

You can also change information about an existing representative through **My Account** or by completing a new Form T1013. For example, if your existing representative does not have online access and you would like to give the CRA your authorization to deal with them online, you have to complete a new authorization form because representatives are not automatically given online access when they register the business, themselves or a group with the "Represent a Client" service.

You do not have to complete a new form every year if there are no changes.

Part 1 – Taxpayer 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 or T5 filer identification number.

Part 2 – Representative information and authorization

Section A – Authorize online access (including access by telephone, in person, and in writing)

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

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

> **Note**
> You have to provide the **RepID** and the name of your representative if he or she is an individual, the **GroupID** and the name of the group if your representative is a group of individuals, or the **business number** (BN) and the name of the business if your representative is a business.

If you give authorization for online access and you have a "care of" address on your account, a letter will be sent to you to confirm the authorization. Online access will not be granted until you or your legal representative calls the CRA to confirm the authorization for online access.

Section B – Authorize access by telephone, in person, and in writing (no online access)

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

You have to provide the name of your representative if it is an individual, the business name if your representative is a business or the name of your representative **and** the business name if you want the CRA to deal with a specific individual from that business.

Levels of authorization

There are two levels of authorization you can give to your representative. By specifying the level of authorization, you are controlling the type of access or information we give to your representative.

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

(Vous pouvez obtenir ce formulaire en français à **www.arc.gc.ca/formulaires** ou en composant le **1-800-959-7383**.)

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Level 1 – **Disclose**

We may disclose information to your representative such as:

- information given on your *T1 General Income Tax and Benefit Return* or your *T3 Trust Income Tax and Information Return*;
- adjustments to your *T1 General 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 benefits and credits (Canada child tax benefit, universal child care benefits, goods and services tax/harmonized sales tax credit, and working income tax benefit); and
- your marital status (but not information related to your spouse or common-law partner).

Level 2 – **Disclose / Request changes**

We may disclose the information listed in level 1 to your representative and, with level 2, he or she may ask for changes to your account. Such changes include adjustments to income, deductions, non-refundable tax credits, and accounting transfers.

Your representative will be able to submit a request for taxpayer relief or file a notice of objection or an appeal on your behalf.

However, your representative **will not be allowed** to change your address, your marital status, and your direct deposit information.

Part 3 – Authorization expiry date

Enter an expiry date for the authorization given in Sections A **or** B of Part 2 if you want the authorization to end at a particular time. Your authorization will stay in effect until **you** or **your representative** cancels it, **it reaches the expiry date you choose**, or we are notified of your death.

Part 4 – Cancel one or more existing authorizations

You can immediately cancel an existing authorization either at **www.cra.gc.ca/myaccount** or by calling us at **1-800-959-8281**. You can also cancel an existing authorization by completing parts 1, 4, and 5 of this form. An authorization will stay in effect until you cancel it, it reaches the expiry date you choose, or we are notified of your death. Your representative may request by telephone, in person, online, or in writing, that the authorization you have given him or her be cancelled. Make note of each authorization you give so you can cancel them when they are no longer needed.

Part 5 – Signature and date

To protect the confidentiality of your 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.

If you are signing this form as the **taxpayer**, you must **sign** and **date** this form.

If you are signing this form as the **legal representative** (executor or administrator of the taxpayer's estate, power of attorney, guardian or trustee or custodian for a trust), you must **tick** the legal representative box and **sign** and **date** this form. If not already done, send a **complete** copy of the **legal document** giving you the authority to act in this capacity to the taxpayer's tax centre.

If **two or more** legal representatives are acting jointly on the taxpayer's behalf, **each** legal representative must sign Part 5 of this form.

This form must be received by the CRA **within six months** of its **signature** date. If not, it will not be processed.

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, look on your most recent notice of assessment or notice of reassessment. You may also find it on other notices from us.

St. John's Tax Centre
PO Box 12071 STN A
St. John's NL A1B 3Z1

Summerside Tax Centre
103-275 Pope Road
Summerside PE C1N 6A2

Jonquière Tax Centre
PO Box 1900 STN LCD
Jonquière QC G7S 5J1

Shawinigan-Sud Tax Centre
PO Box 3000 STN Main
Shawinigan-Sud QC G9N 7S6

For trust accounts:
Ottawa Technology Centre
Canada Revenue Agency
Ottawa ON K1A 1A2

Sudbury Tax Services Office
1050 Notre Dame Avenue
Sudbury ON P3A 5C1

Winnipeg Tax Centre
PO Box 14000 STN Main
Winnipeg MB R3C 3M2

Surrey Tax Centre
9755 King George Blvd
Surrey BC V3T 5E1

International and Ottawa Tax Services Office
PO Box 9769 STN T
Ottawa ON K1G 3Y4

Your responsibilities

It is your responsibility to monitor and understand the transactions your representative is conducting on your behalf and to make sure that the information regarding your representative is current. By accessing **My Account**, you can view the transactions your representative made in your account. The CRA often adds new services that your representative can access. It is your responsibility to review the services and decide if your representative should still be authorized to represent you. For a list of services available, go to **www.cra-arc.gc.ca/representatives**. If you feel your representative is not acting in your best interests, you should immediately remove their access to your information.

Service standard for processing this form

We aim to process this paper form in 20 business days or less from the date it is received at the tax centre.

Do you need more information?

For more information, visit **www.cra.gc.ca** or call **1-800-959-8281**.

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

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Authorizing or Cancelling a Representative

Protected B when completed

Important – If you moved recently, update your address and contact information with the Canada Revenue Agency (CRA) online if you are registered with MyAccount, at **www.cra-arc.gc.ca/myaccount**, by telephone at **1-800-959-8281**, or in writing.

Complete this form to authorize the CRA to deal with another person who would act as your representative for income tax matters or to cancel any existing representatives on your account.

By registering with MyAccount at **www.cra.gc.ca/myaccount**, you will be able to provide immediate access to your representative and cancel and manage your representatives through "Authorize my representative." You can also authorize or cancel a representative by completing this form and mailing it to your tax centre. We aim to process this paper form in 20 business days or less from the date it is received at the tax centre. To **immediately cancel** a representative, call us at **1-800-959-8281**.

Part 1 – Taxpayer information

You will need to complete a **separate Form T1013** for each account and representative. Complete the line that applies:

SIN, TTN or ITN *

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

Trust account number

T

Trust name:

T5 filer identification number

H A

Filer name:

Part 2 – Representative information and authorization

You do not have to complete a new form every year if there are no changes. Complete section A **or** B, as applicable.

A. Authorize online access (includes access by telephone, in person, and in writing)

By completing this section to authorize a representative for a **trust** account, the representative will have access to **all** tax **years** with **no** online access.

To grant online access to your representative, your representative must register online through "**Represent a client**" at **www.cra.gc.ca/representatives** and obtain a RepID or GroupID or register their business number (BN). Our online services do not have a year-specific option. Therefore, your representative will have access to **all tax years**.

RepID

Y B 3 P 4 6 M

and First name: ROBERT **Last name:** MCCLELLAND

GroupID

G

and Name of group:

Business number (BN)

8 7 4 9 2 2 0 4 0

and Name of business: THE MCCLELLAND FINANCIAL GROUP

Enter the **level of authorization** (level 1 or 2): 2 If you **do not specify** a level of authorization, we will **assign a level 1**.

If you authorize your representative for **online** access and have a **"care of"** address, you will receive a letter to confirm the authorization.

or

B. Authorize access by telephone, in person, and in writing (no online access)

If you are authorizing an individual, enter the individual's full name. If you are authorizing a business, enter the name of the business. If you want us to deal with a specific individual from that business, enter both the individual's name and the business name. If your representative is a business and you do not identify an individual in that business as your representative, you are authorizing the CRA to deal with **anyone** from that business.

Individual: First name: Last name:

Name of business:

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

or

☐ Enter the applicable tax year or years (past and/or present), and specify the level of authorization (level 1 or 2) for **each** tax year.

Tax year(s)										
Level of authorization										

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Part 3 – Authorization expiry date

Enter an expiry date, if applicable, otherwise the authorization will stay in effect until **you** or **your representative** cancels it or we are notified of your death.

Year Month Day

Part 4 – Cancel one or more existing authorizations

Complete this section **only** to cancel an existing authorization. Tick the appropriate box.

☐ Cancel **all** authorizations

or

☐ Cancel the authorizations given for the individual, group, or business identified below:

RepID

First name: _____ **Last name:** _____

GroupID

G

Name of group: _____

Business number (BN)

Name of business: _____

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, and **sign** and **date** this form.

☐ **I am the legal representative for this taxpayer or estate/trust** (executor/administrator, power of attorney, the legal guardian or the trustee or custodian of this trust account).

Important: You must send a **complete** copy of the **legal document** giving you the authority to act in this capacity to the taxpayer's tax centre. Read the attached information sheet for tax centre addresses.

If **two or more** legal representatives are acting **jointly** on the taxpayer's behalf, **each** representative must sign below.

* _____

Print name of taxpayer or each legal representative

X _____

SIGN HERE

Signature of taxpayer or each legal representative,
a parent if taxpayer is under the age of 16,
a witness when signed with a mark

Year Month Day

* Date of signature

If your representative has not electronically submitted this form on your behalf then it must be submitted **within six months** of the date of signature. If not, it will not be processed.

Privacy Act, personal information bank number CRA PPU 175

ORIGINAL REQUIRED

BARCODE