How do I set up CRA My Account?

Setting up CRA My Account allows you to access your tax information online and authorize me to file your return. Here's how to get started:

1. Gather what you'll need:

- Social Insurance Number (SIN)
- Date of birth
- Postal code (must match CRA records)
- A line number from your previous tax return
- Email address (optional but helpful)

2. Go to the CRA My Account portal:

Search "CRA My Account" on the Government of Canada website and choose **My Account for Individuals**.

You can sign in using:

- **Sign-In Partner** (your online banking login),

  or

- **CRA User ID and Password** (create a CRA-specific login)

3. Register your account:

If creating a CRA login:

- Select **CRA register**
- Create a User ID and password
- Set security questions
- Enter your personal information
- Enter the requested line number from your previous return

If using Sign-In Partner:

- Choose your bank
- Sign in
- Enter your personal information when prompted

4. Wait for your security code:

CRA will mail you a security code within 5–10 business days.

You can access limited features before the code arrives.

5. Activate your account:

Once the code arrives, log in and enter it to fully activate your account.

6. Authorize me as your representative:

- Log in to CRA My Account
- Go to **Profile** or **Authorized Representatives**
- Select **Authorize a representative**
- Enter the Rep ID or Business Number I provide
- Confirm and submit

You’re all set.