

About This Guide

This guide walks a primary trustee through two tasks: (1) registering a trust account with the Canada Revenue Agency (CRA) using My Trust Account, and (2) authorizing a representative to access that account on your behalf.

What you'll need — A personal CRA account (My Account) with verified identity. You also need a trust account number (T3 number), or you can register one during the process below. The primary trustee must complete setup before any representatives can be added.

PART 1

Register for a Trust Account

1 Sign in to your CRA account

Go to canada.ca/cra-login and sign in using your GCKey, Sign-In Partner (e.g. your bank), or provincial login.

2 Access Represent a Client (RAC)

From the Welcome page, select Add account and choose Represent a Client. First-time users will be prompted to create a RepID — a 7-character alphanumeric identifier.

3 Verify your name matches the trust

Make sure the name on your RepID exactly matches the primary trustee name on the CRA trust account. A mismatch will block access.

4 Complete Primary Trustee registration

In Represent a Client, select Authorization request → choose your RepID from the dropdown → select Primary Trustee registration → complete the enhanced identity validation about the trust account.

5 Access My Trust Account

Once confirmed, you receive immediate access. From the Represent a Client Welcome page, enter your T3 trust number and select Access T3 to open My Trust Account (MyTA).

PART 2

Authorize HW Partners as Your Representative

HW Partners Business Number (BN): 862584489 — you will need this in Step 3 below.

1 Open My Trust Account

Sign in → Represent a Client → enter your trust number → select Access T3.

2 Go to Authorized Representatives

In MyTA, select Authorize my representative, then click + Add.

3 Add HW Partners as a representative

In the Authorized representative(s) section, click + Add. Read the Before you begin information and select Start. Enter HW Partners' Business Number (BN): 862584489, click Search to confirm the details, then click Next.

4 Set the authorization level

Select Level 2 for online access, set an expiry date or leave blank, then click Next.

5 Review and submit

Review the details, check the confirmation box, and click Submit. HW Partners will be authorized immediately.

Authorization Levels at a Glance

Level	Who	Capabilities
1	Authorized rep	View trust ID, account balance, mail, and returns (read-only).
2	Authorized rep	Level 1 + submit documents and request remittance vouchers.
3	Primary Trustee / Legal Rep	Full access: update address, direct deposit, make payments, manage representatives, and view trustees.