



RYAN LAMONTAGNE  
Fee-based financial planning

Financial Planning • Tax Planning • Retirement Planning • Estate Planning

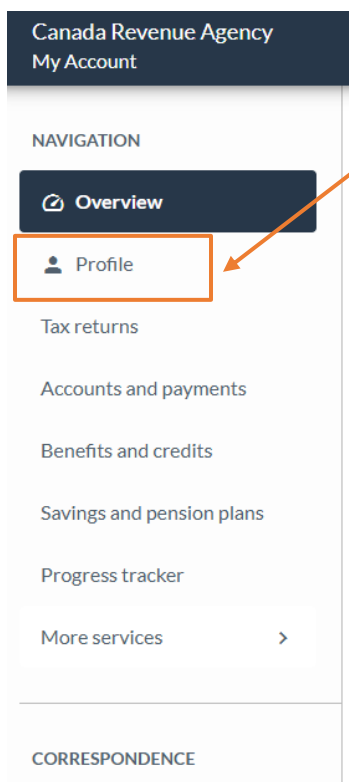
## How to Authorize Ryan Lamontagne Inc. as a CRA Tax Representative

### Step 1: [Sign in to your CRA account](#)

- Note: If you do not have access to your CRA online account or are unable to authorize a representative online, you can still appoint us as your CRA Tax Representative. Please contact us directly, and we will provide you with alternative authorization options.

### Step 2: Select your **Individual** account to access “My Account”

### Step 3: From the navigation menu on the left, select **Profile**



**Step 4:** Scroll down to the "Authorized representative(s)" section, and select **+Add**

## Step 5: Select Start

### Authorize a representative

#### 1 Before you begin

This authorization allows your representative to deal with the Canada Revenue Agency by internet, by telephone, by fax, in person or in writing.

Your representative will have access to all tax years as our online service does not yet have a year-specific option.

Start

#### 2 Enter representative information

#### 3 Select authorization details

#### 4 Review and confirm

## Step 6: Enter RLI's BN number which is: 864123328

### Enter representative information

Fields marked with an asterisk ( \* ) are required.

To authorize a representative to deal with the CRA on your behalf enter:

- **Representative identifier (RepID):** It is a 7-character alphanumeric code
- **Group identifier(GroupID):** It is a 6-character alphanumeric code, beginning with a G
- **Business number (BN) of a business:** It is a 9-digit identification number, if you enter a BN, you are authorizing CRA to deal with anyone from that business.

\* RepID, GroupID or BN

Search

RLI's representative information should pop up as below.

#### Representative information

Name: RYAN LAMONTAGNE INC

BN: 864123328

Phone number: 6135963353

Fax number: 613-596-2441

## Step 7: Select authorization details as follows:

- Authorization level = **Level 2**
- Online Access = **Yes**
- Expiry Date = Select “**does not expire**”

### \* Authorization level

☐ **Level 1** - Allow your representative access to information only.

☒ **Level 2** - Allow your representative access to information and to make certain account changes.

> Level 1

> Level 2

### \* Online access

Online access allows a representative to deal with the Canada Revenue Agency by internet, by telephone, by fax, in person or in writing.

☒ Yes

☐ No

### \* Expiry date

YYYY - MM - DD 

☒ Does not expire

## Step 8: Review and confirm

### \* Confirmation

- ☒ I confirm that the CRA may deal directly with the above named representative for the specified level of authorization. I acknowledge that these activities may occur without the CRA advising me.