



Completing the Business Self-Certification Form

Before You Begin

- Have your DocuSign email and PIN ready. Your Access Code/PIN is the last four digits of the primary business phone number you have on file with ATB.
- After entering your PIN, you can scroll through the entire document for review before clicking the "Start" button. Once you click "Start," the form's auto-navigation will begin.
- Confirm who is the best authorized signer to complete the form.

Reassigning the DocuSign Form

If you feel another authorized signer for the company should execute this form, you can reassign the DocuSign envelope. For instructions on how to reassign, please refer to the original email sent to you by ATB. Note: Businesses operating as a sole proprietorship cannot reassign the form.

Step-by-Step Instructions

1. **Open the DocuSign Email:** Navigate to the email you received and use your PIN to access the secure form.
2. **Review:** Take a moment to review the form before clicking "Start."
3. **Complete the Form:** The form will guide you through the required fields. Some boxes will be pre-filled based on the information we have on file. Please verify this information is correct. The form also includes other features to assist you, such as automatically skipping sections that aren't required and information validation.
4. **Final Review:** Review all your answers for accuracy before clicking the "Finish" button to submit.

Guidance and CRA Resources

The DocuSign form contains helpful links to the Canada Revenue Agency (CRA) website for clarification. For your convenience, they are also listed here:

- [List of Participating Jurisdictions](#) (Relates to Section C.3 of the form)
- [CRA Guidance on Controlling Persons](#) (Relates to Section E of the form)
- [Information for entities holding accounts with Canadian financial institutions](#)
- [Enhanced financial account information reporting](#)
- [Declaration of Tax Residence for Entities \(Form RC519\)](#)