

# Navigating the *My Brokerage* Tab



Pages - Brokerage Dashb... x

← → ↻ <https://uat.myreca.ca/myBrokerage/Pages/BrokerageDashboard.aspx> ☆ ☰

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# myRECA

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**Licence** Cease Brokerage

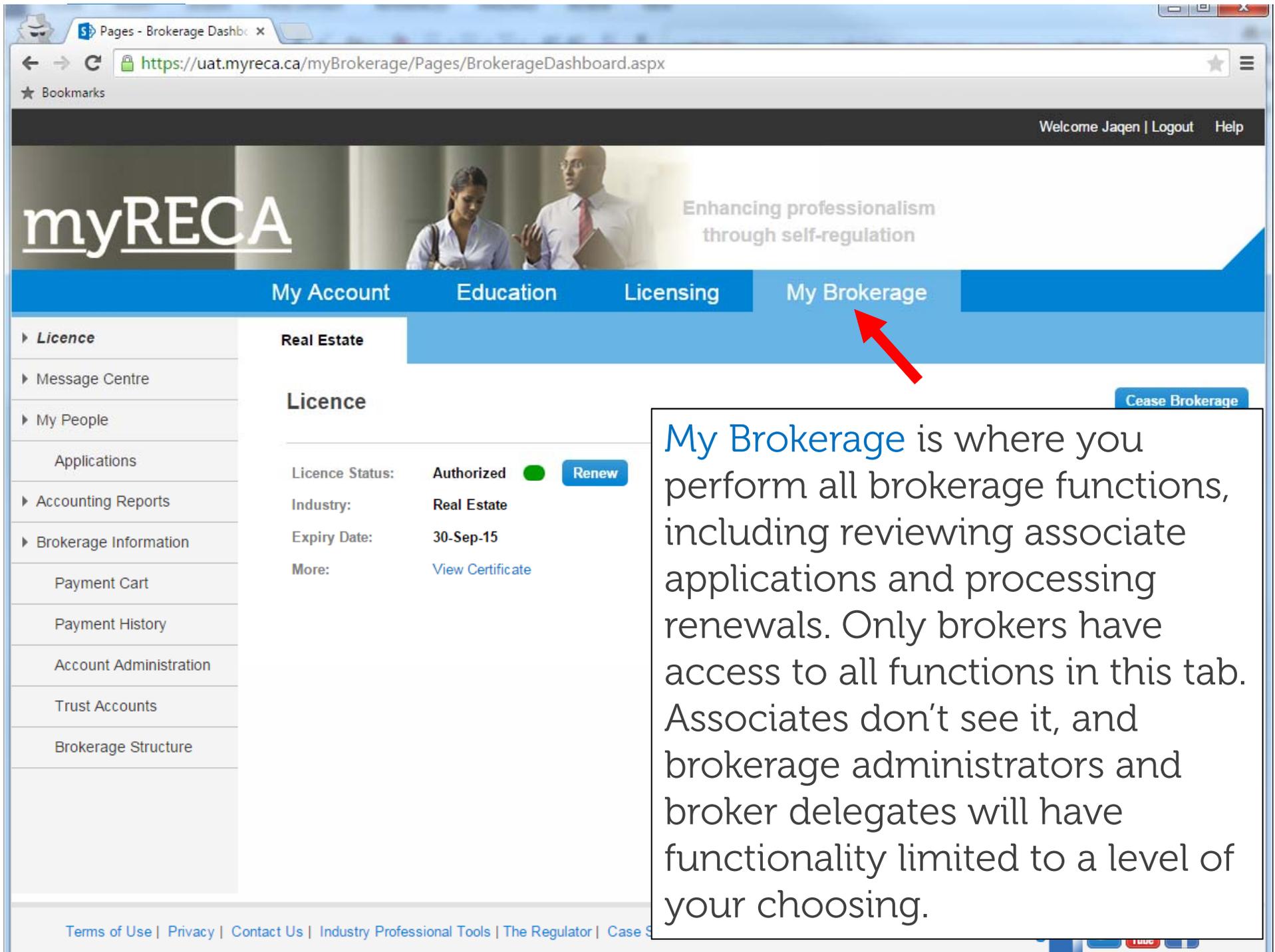
Licence Status: **Authorized** ● [Renew](#)

Industry: **Real Estate**

Expiry Date: **30-Sep-15**

More: [View Certificate](#)

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**My Brokerage** is where you perform all brokerage functions, including reviewing associate applications and processing renewals. Only brokers have access to all functions in this tab. Associates don't see it, and brokerage administrators and broker delegates will have functionality limited to a level of your choosing.

The Cease Brokerage application is here. Your administrators and delegates will never see this button.

The screenshot shows a web browser window with the URL <https://uat.myreca.ca/myBrokerage/Pages/BrokerageDashboard.aspx>. The page features the myRECA logo and a navigation menu with tabs for My Account, Education, Licensing, and My Brokerage. A red arrow points to a blue button labeled 'Cease Brokerage' in the top right corner of the main content area. The main content area displays 'Licence' information for Real Estate, including 'Licence Status: Authorized' with a green dot and a 'Renew' button, 'Industry: Real Estate', 'Expiry Date: 30-Sep-15', and a 'View Certificate' link. A footer contains links for Terms of Use, Privacy, Contact Us, Industry Professional Tools, The Regulator, and Case Summaries, along with social media icons for RECA Blog, Twitter, YouTube, and Facebook.

# Brokerage Information

- editing contact information
- credit balance



The Brokerage Information page contains your brokerage names, corporate registrations, fiscal-year-end, account balance and the brokerage contact information.

Pages - Brokerage Inform x

https://uat.myreca.ca/myBrokerage/Pages/BrokerageInformation.aspx

My Account Education Licen

Real Estate

Brokerage Information

Brokerage Class: Corporation Agency Type: Common Law

Legal Name of Brokerage: Test Brokerage Registered Trade Name: Test Brokerage

Registration Number: 2309483 Effective Date: 6-May-15

Account Balance: \$4169.96 Fiscal Year End: 30-May-15

Business Address: [Edit](#)

Address: 350, 4954 Richard Rd SW

City: Calgary

Country: Canada

Province: Alberta

Postal Code: T3E6L1

Mailing Address: [Edit](#)

Address: 350, 4954 Richard Rd SW

City: Calgary

Country: Canada

Province: Alberta

Postal Code: T3E6L1

Contacts: [Edit](#)

Primary Phone: 403-555-5555

Alternate Phone:

Fax:

Email: broker@testbrokerage.ca

Web Site: http://www.testbrokeragecalgary.ca

Location of financial information [Edit](#)

Address: 300 Bank Street

City: Calgary

Country: Canada

Province: Alberta

Postal Code: T5R8I9

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View your brokerage account balance here. If you have a balance, it will be applied to the next application you complete. You will not be asked for a credit card number.

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**Brokerage Information**

Brokerage Class:	Corporation	Agency Type:	Common Law
Legal Name of Brokerage:	Test Brokerage	Registered Trade Name:	Test Brokerage
Registration Number:	2309483	Effective Date:	6-May-15
Account Balance:	\$4169.96	Fiscal Year End:	30-May-15

Business Address: [Edit](#)

Address: 350, 4954 Richard Rd SW  
City: Calgary  
Country: Canada  
Province: Alberta  
Postal Code: T3E6L1

Mailing Address: [Edit](#)

Address: 350, 4954 Richard Rd SW  
City: Calgary  
Country: Canada  
Province: Alberta  
Postal Code: T3E6L1

Contacts: [Edit](#)

Primary Phone: 403-555-5555  
Alternate Phone:  
Fax:  
Email: broker@testbrokerage.ca  
Web Site: http://www.testbrokeragecalgary.ca

Location of financial information [Edit](#)

Address: 300 Bank Street  
City: Calgary  
Country: Canada  
Province: Alberta  
Postal Code: T5R8I9

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Edit your brokerage contact information here. A change in your brokerage's Business Address requires RECA review. There is no cost for this.

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https://uat.myreca.ca/myBrokerage/Pages/Broke

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### Brokerage Information

Brokerage Class:	Corporation	Agency Type:	Common Law
Legal Name of Brokerage:	Test Brokerage	Registered Trade Name:	Test Brokerage
Registration Number:	2309483	Effective Date:	6-May-15
Account Balance:	\$4169.96	Fiscal Year End:	30-May-15

Business Address: [Edit](#)

Address: 350, 4954 Richard Rd SW  
City: Calgary  
Country: Canada  
Province: Alberta  
Postal Code: T3E6L1

Contacts: [Edit](#)

Primary Phone: 403-555-5555  
Alternate Phone:  
Fax:  
Email: broker@testbrokerage.ca  
Web Site: http://www.testbrokeragecalgary.ca

Mailing Address: [Edit](#)

Address: 350, 4954 Richard Rd SW  
City: Calgary  
Country: Canada  
Province: Alberta  
Postal Code: T3E6L1

Location of financial information [Edit](#)

Address: 300 Bank Street  
City: Calgary  
Country: Canada  
Province: Alberta  
Postal Code: T5R8I9

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# Associates in your brokerage (my People)



Your brokerage's associate brokers/associates are listed here.



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Real Estate

My People

Add Associate Brokerage Summary Report

Maximum of 50 records are retrieved, if you need more details click on the Brokerage Summary Report link

Name:  Renewal Status: REP Status: Sector:  All All All Search

Number of People: 4

Name	Username	Licence Class	Sectors	Renewed	Issued Date	Stop Code
Test Test	testfordale	Associate	Comm   PM   Res   Rur	No	9-Dec-15	No
Kam Chancellor (TEST)	kambam33	Broker	Comm   PM   Res   Rur	No	1-Oct-15	Yes
Speed Demon	speeddemon	Associate	Comm   PM   Res   Rur	No	1-Oct-15	No

Create a snapshot summary of your brokerage by clicking the Brokerage Summary Report button.

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My People

Add Associate Brokerage Summary Report Search for Username

Maximum of 50 records are retr

Name:

All All All Search

Number of People: 4

Name	Username	Licence Class	Sectors	Renewed	Issued Date	Stop Code	Reports
Test Test	testfordale	Associate	Comm   PM   Res   Rur	No	9-Dec-15	No	<a href="#">View History</a>
Kam	kamkam33	Broker	Comm   PM	No	1-Oct-15	Yes	<a href="#">View History</a>

Terms

Your brokerage's associate brokers/associates are listed here.

myRECA lists the people in your brokerage here, 50 records at a time. You can export a PDF of this list with the printer icon.

The Brokerage Summary Report, gives important brokerage information and a list of active industry professionals. You can apply filters to the report, including REP completions and Renewal Status

The screenshot shows a web application interface for a 'Brokerage Summary Report'. At the top, there is a navigation bar with 'Actions' and a search field. Below this, the 'Export' menu is open, showing options for CSV, PDF, Excel, TIFF file, and Word. To the right, the 'Parameters' sidebar is visible, with 'REP Course' and 'Renewed' dropdown menus. The main content area displays a table with columns for 'Name', 'Industry', 'Broker', and 'Fiscal Year End'. Below this, there is a section for 'Active Industry Professionals' with a table listing individual professionals and their details.

Name	Industry	Broker	Fiscal Year End
Test - Kee	Real Estate	Kam Chancellor (TEST)	6/7/2016

History	Full Name	AKA	Class	Issue Date	Authorizations	REP Course	Renewed
<a href="#">View</a>	Kam Real Estate Broker Chancellor (TEST)		Broker	10/1/2015	Comm.PM.Res.Rur.	No	No
<a href="#">View</a>	Speed Demon		Associate	10/1/2015	Comm.PM.Res.Rur.	No	No
<a href="#">View</a>	Test Real Est Assoc EE Test		Associate	10/1/2015	PM.Res.	No	Yes
<a href="#">View</a>	Test Test		Associate	12/9/2015	Comm.PM.Res.Rur.	No	No
count	4						

Select Actions>Export to select a file type for exporting your report.

If you know your new associate's myRECA username, add them to your brokerage using the [Add Associate](#) button.

Search for a new associate's myRECA username using the [Search for Username](#) button.

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[Add Associate](#)

[Brokerage Summary Report](#)

[Search for Username](#)

Maximum of 50 records are retrieved, if you need more details click on the [Brokerage Summary Report](#) link

Name:  Renewal Status: REP Status: Sector:

All  All  All [Search](#)

Number of People: 4

Name	Username	Licence Class	Sectors	Renewed	Issued Date	Stop Code	Reports
Test Test	testfordale	Associate	Comm   PM   Res   Rur	No	9-Dec-15	No	<a href="#">View History</a>
Kam	kambam33	Broker	Comm   PM   Res   Rur	No	1-Oct-15	Yes	<a href="#">View History</a>
Chancellor (TEST)							
Speed	speeddemon	Associate	Comm   PM	No	1-Oct-15	No	<a href="#">View History</a>

Search for eligible associates by their username. If they do not appear, they are not eligible to be licensed. Make sure you type the username correctly.

The screenshot shows the myRECA website interface. The main navigation bar includes "My Account", "Education", "Licensing", and "My Brokerage". A modal window titled "Search for Industry Professionals" is open, featuring a "Username:" input field and a blue "Search" button. A red arrow points to the "Search" button. The background shows a sidebar with "My People" and a table of professional records.

Real Estate3	realestate3	Associate	Comm   Rur	No	Not completed	No	Cancel
Real Estate4	realestate4	Associate	Comm   PM   Res No		Not completed	No	Cancel
			Rur				

View your associate's renewal status here. This column is only visible during the renewal period.

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## Real Estate

### My People

Add Associate

Brokerage Summary Report

Search for Username

Maximum of 50 records are retrieved, if you need more details click on the [Brokerage Summary Report](#) link

Name:  Renewal Status:  REP Status:  Sector:

Number of People: 4

Name	Username	Licence Class	Sectors	Renewed	Issued Date	Stop Code	Reports
Test Test	testfordale	Associate	Comm   PM   Res   Rur	No	9-Dec-15	No	<a href="#">View History</a>
Kam	kambam33	Broker	Comm   PM   Res   Rur	No	1-Oct-15	Yes	<a href="#">View History</a>
Chancellor (TEST)							
Speed	speeddemon	Associate	Comm   PM	No	1-Oct-15	No	<a href="#">View History</a>





You can search for all of your associates who haven't renewed or haven't completed the Re-Licensing Education Program (REP) using the [Search](#) function.

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My People

[Add Associate](#) [Brokerage Summary Report](#) [Search for Username](#)

Maximum of 50 records are retrieved, if you need more details click on the [Brokerage Summary Report](#) link

Name:  Renewal Status: REP Status: Sector:

All All All

Number of People: 4

Name	Username	Licence Class	Sectors	Renewed	Issued Date	Stop Code	Reports
Test Test	testfordale	Associate	Comm   PM	No	9-Dec-15	No	<a href="#">View History</a>
Kam	kambam33	Chancellor	(TEST)				
Speed	speeddemon						

View each associate's REP status here. If no REP is required for the current licensing year, this column is not visible.

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My People Add Associate

Search

Stop Code

	Jake FakeName	realestate1	Associate	Res	No	Not completed	No
	Jane FakeName	realestate3	Associate Broker	Comm   PM   Res   No		Not completed	No
				Rur			
	John Broker	RECAbroker8	Broker	Comm   PM   Res   No		Not completed	No
				Rur			
	Julio FakeName	realestate2	Associate	Comm   Res   Rur	No	Completed	No

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You can cancel an associate's registration with your brokerage clicking on the Associate's name then clicking the **Cancel** link in their contact card.



# Brokerage Amendments



Your Shareholders, Directors and Officers are listed here on the Brokerage Structure page within the My Brokerage tab. Report a brokerage structure amendment (change in ownership type or percentage, change in directors, officers or shareholders with the brokerage) by clicking [Report a Structure Amendment](#).

The screenshot shows the RECA website interface. At the top, there is a navigation bar with tabs for 'My Account', 'Education', 'Licensing', and 'My Brokerage'. A red arrow points to the 'My Brokerage' tab. Below this, a sidebar menu on the left lists various account management options, with 'Brokerage Structure' highlighted and a red arrow pointing to it. The main content area is titled 'Real Estate' and 'Brokerage Structure Information'. It contains three sections: 'Shareholders', 'Directors', and 'Officers'. Each of the first two sections shows 'No Records Found'. The 'Officers' section contains a table with one entry:

Full Name	Contact Information
Jane Director	403-555-5555

To the right of the 'Brokerage Structure Information' heading, there is a blue button labeled 'Report a Structure Amendment', with a red arrow pointing to it. At the bottom of the page, there is a footer with links for 'Terms of Use', 'Privacy', 'Contact Us', 'Industry Professional Tools', 'The Regulator', and 'Case Summaries'. On the right side of the footer, there are logos for 'RECA Blog', 'RECA', 'YouTube', and 'Facebook'.

Read all instructions carefully.



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### Brokerage Amendment

If there is a change to the brokerage corporation's officers, directors or shareholders, RECA requires:

- a completed Corporate Structure Amendment Application (which you submit through this process)
- a letter summarizing the changes
- a completed [Corporate Summary](#)

If the broker does not have (or no longer has) controlling interest (greater than 50%) in the ownership of the brokerage, a Continuing Guarantee and a Broker Management Agreement giving the broker authority to carry out the duties and responsibilities of a broker must be provided to RECA (a sample Continuing Guarantee and sample Broker Management Agreement that is industry-specific can be found on RECA's website on the All Forms page)

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https://secure.myreca.ca/myBrokerage/Pages/CorpStructureChange.aspx?brokerageID=ACC-00002165

myRECA

# myRECA

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## Brokerage Amendment

### Corporate Structure Amendment

Please answer the following:

Is your corporation active with Alberta's Corporate Registry?

Yes  No

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You must answer Yes to this question. If you are a corporation and are not active with Alberta's Corporate Registry and do not have an active Registry number, you must cease your brokerage immediately.

Pages - Request Licence | x

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### Brokerage Amendment

#### Corporate Structure Amendment

Please select the applicable amendments and press **Next**. If your brokerage is a Partnership and partnership information is changing, please contact RECA at [info@reca.ca](mailto:info@reca.ca).

**Changes to Officer(s)?**

- Not applicable
- Add People
- Remove People

**Changes to Director(s)?**

- Not applicable
- Add People
- Remove People

**Changes to Shareholder(s)?**

- Not applicable
- Add People
- Remove People

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Indicate what sort of amendment you're making to the corporate structure. If you are a partnership, do not continue with the amendment. Contact RECA.

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Indicate if the structure change affects the level of broker ownership.

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### Brokerage Amendment

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#### Corporate Structure Amendment

What is the broker's ownership percentage as a result of this amendment?

Select the level of broker ownership:

- The broker owns 100% of the brokerage
- The broker owns greater than 50% of the brokerage
- The broker owns 50% or less of the brokerage

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Pages - My Applications x

https://secure.myreca.ca/myAccount/Pages/Applications.aspx?display=page

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- ▶ Message Centre
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When you pay the fee and submit the structure change, you can find it under My Account and My Applications. Corporate structure amendments require supporting documents. Upload them by clicking Complete. When your amendments are reviewed by RECA, the Status changes to Approved and your amendments will be reflected on the Brokerage Structure page.

Real Estate	Structure Amendment	Waiting for Details	Applicant	5-Jun-15	<a href="#">Cancel</a>   <a href="#">Complete</a>   <a href="#">View</a>
N/A	Licence History Request	Submitted	RECA	5-Jun-15	<a href="#">View</a>
Real Estate	New Brokerage - Licensing Fees	Approved	RECA	5-Jun-15	<a href="#">View</a>
Real Estate	New Brokerage Application - Review	Approved	RECA	5-Jun-15	<a href="#">View</a>
Real Estate	Licence Mobility	Approved	RECA	5-Jun-15	<a href="#">View</a>

Apply for:

- [Licence Mobility](#)
- [Education Eligibility](#)

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# Brokerage Administration

- adding administrators/broker delegates
- assigning permissions



Account Administration is where your brokerage administrators and broker delegates are listed. You can also [Add New](#), [Edit](#) and [Remove](#) from here.

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**Account Administration**

**Brokerage Administrators** [Add New](#)

	Effective Date From	Effective Date To	Actions
Brokerage Administrator	14-May-15		<a href="#">Edit</a>   <a href="#">Remove</a>

**Broker Delegates** [Add New](#)

	Effective Date From	Effective Date to	Actions
High Sparrow	14-May-15		<a href="#">Edit</a>   <a href="#">Remove</a>

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To add a brokerage administrator, they must first create their own myRECA account. Then, you add them by searching for their myRECA username, which they give you.  
To add a broker delegate, you need the delegate's username.

The screenshot shows the myRECA website interface. The top navigation bar includes 'My Account' and 'Education'. A left sidebar contains a menu with items like 'Licence', 'Message Centre', 'My People', 'Applications', 'Accounting Reports', 'Brokerage Information', 'Payment Cart', 'Payment History', 'Account Administration', 'Trust Accounts', and 'Brokerage Structure'. The main content area is titled 'Account Administration' and features two sections: 'Brokerage Administrators' and 'Broker Delegates'. Each section has an 'Add New' button, indicated by a red arrow. Below each section is a table with columns for 'Effective Date From', 'Effective Date To', and 'Actions'.

	Effective Date From	Effective Date To	Actions
<b>Brokerage Administrators</b>			<a href="#">Add New</a>
Brokerage Administrator	14-May-15		<a href="#">Edit</a>   <a href="#">Remove</a>

	Effective Date From	Effective Date to	Actions
<b>Broker Delegates</b>			<a href="#">Add New</a>
High Sparrow	14-May-15		<a href="#">Edit</a>   <a href="#">Remove</a>

At the bottom of the page, there is a footer with links for 'Terms of Use', 'Privacy', 'Contact Us', 'Industry Professional Tools', 'The Regulator', and 'Case Summaries'. On the right side of the footer, there are social media icons for RECA Blog, REC, Twitter, YouTube, and Facebook.

### Add Administrator

#### Set Permissions

Brokerage Financials

Brokerage Trust Accounts

Effective From:  

Effective To:  

Save

Cancel

You may give a Brokerage Administrator access to your trust accounts and/or allow them to make payments on behalf of the brokerage.

You decide your broker delegate's permissions when you add them. You can edit it at anytime.

### Add Delegate

#### Set Permissions

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Brokerage Payments

Brokerage Acknowledgements

Brokerage Amendments

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File Brokerage Accounting Reports

New Brokerage Applicants

Transfer Associate To Brokerage

Effective From:  

Effective To:  

Save

Cancel

# Trust Accounts and Accounting Reports

- adding/editing/closing trust accounts
- completing fiscal-year-end accounting forms
- brokerage accountants and myRECA



Add, edit, search, or close trust accounts here.

Create a Trust Account Report by clicking Brokerage Trust Accounts

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### Trust Accounts

Maximum of 50 records are retrieved, if you need more details click on the [Brokerage Trust Report](#) link

Account Number:

Number of Accounts: 6

Account Number	Transit Number	Financial Institute	Date Opened	Date Closed	Actions
654789	Printtest	Chinook Credit Union	19-Aug-15		<a href="#">Edit</a>
123456789	7777777	Scotia Bank	19-Jun-15		<a href="#">Edit</a>
23423	23432	1ST CHOICE SAVINGS	11-May-15		<a href="#">Edit</a>
224224	42245	Coquitlam Horizon Credit Union	4 May 15		<a href="#">Edit</a>

[Add New Trust Account](#) [Brokerage Trust Accounts](#)

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0002022 (2).pdf ACC-0002022 (1).pdf [Show all do](#)

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## Brokerage Trust Account Report

Executed on: 7/8/2016 1:48:59 PM

(\*click the actions menu to save a copy of the report)

Name	Industry	Broker	Fiscal Year End
Test - Keep It Realty (TEST)	Real Estate	Kam Chancellor (TEST)	6/7/2016

Email Address	
Main Phone	
Business Address	350-4954 Richard Rd SW Calgary Alberta T3E 6L1 Canada
Financial Address	906-733 14 Ave SWCalgaryAlbertaAlberta

### Trust Accounts

Institution	Account Number	Transit	Date Opened	Date Closed	Address
CITIZENS BANK OF CANADA	5465465sdfsdf	232134	5/27/2015	5/30/2015	906 - 733 14th Ave SW
Bow Valley Credit Union	hi	there	5/28/2014	5/29/2015	1234 Any Street
HSBC Canada	1337!	1337!	5/28/2015	6/5/2015	1234 Any Street
Caisse Horizon Credit	234324	12345	5/4/2015		3243242

Select Actions>Export to select a file type for exporting your report.

IST CHOICE SAVINGS	32432	34324	5/4/2015	5/28/2015	32432
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Fiscal year end reporting is done here. To complete Form 3 – Accountant's Report, your accountant must create a myRECA account as a Brokerage Accountant. Tutorials are available for them.

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https://uat.myreca.ca/myBrokerage/Pages/AccountingReports

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Accounting Reports

Your Form 2 - Declaration of ... appear in the table below.

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- Trust Accounts
- Brokerage Structure

begin an accounting report, click **Add New Accounting Report**. If you complete a Form 2, a licensed CPA must review your answers and complete a Form 3 - Accountant Report on myRECA. When you complete your Form 2, give your accountant the Form 2 Application ID from this table. They can search myRECA for the form using the unique Application ID and complete the Form 3.

[Add New Accounting Report](#)

Application ID	Form Type	Status	Submitted By	Date	Actions
APP-00003166	Fiscal Year End - Form 3	New	Trust Account User	8-May-15	
APP-00003165	Fiscal Year End - Form 2	Submitted	Applicant	8-May-15	<a href="#">View</a>
APP-00003164	Fiscal Year End - Form 2	New	Applicant	8-May-15	<a href="#">Cancel</a>   <a href="#">Complete</a>
APP-00003159	Fiscal Year End - Form 2	New	Applicant	8-May-15	<a href="#">Cancel</a>   <a href="#">Complete</a>
APP-00003158	Fiscal Year End - Form 2	New	Applicant	8-May-15	<a href="#">Cancel</a>   <a href="#">Complete</a>
APP-00003157	Fiscal Year End - Form 2	New	Applicant	8-May-15	<a href="#">Cancel</a>   <a href="#">Complete</a>
APP-00003156	Fiscal Year End - Form 2	New	Applicant	8-May-15	<a href="#">Cancel</a>   <a href="#">Complete</a>
APP-00003154	Fiscal Year End - Form 3	Submitted	RECA	8-May-15	<a href="#">View</a>

Read all instructions carefully. Select which type of report you're submitting.

myRECA

through self-regulation

My Account

Education

Licensing

My Brokerage

▸ Licence

▸ Message Centre

▸ My People

Applications

▸ **Accounting Reports**

▸ Brokerage Information

Payment Cart

Payment History

Account Administration

Trust Accounts

Brokerage Structure

## Accounting Reports

### Types of Accounting Reports

There are two types of fiscal-year-end accounting forms brokers can complete and submit using myRECA.

**Form 2** is a Declaration of Trust Transactions. Complete this form if you had trust transactions during your fiscal year. Once complete, a licensed accountant must review your Form 2 and complete Form 3 from their own myRECA account. Instructions for your accountant to create their own myRECA account are [here](#). When you complete Form 2, myRECA generates a unique application number and sends it to you in an email. Give this number to your accountant. From their myRECA account, they can search for your Form 2 using this number, complete Form 3 and submit it to RECA for review.

**Form 4** is a Declaration Respecting the Absence of Trust Transactions. This form does not require accountant review.

**IMPORTANT:** Before proceeding, ensure the information for your brokerage trust accounts is up-to-date. To review your active accounts, click on **Trust Accounts** on the left menu.

Which form would you like start?

Form 2

Form 4

Create

# Payment History

- Viewing and creating reports from your payment history



View your payment history and download copies of any receipts here.

My Account

Ed

► Licence

► Message Centre

► My People

Applications

► Accounting Reports

► Brokerage Information

Payment Cart

**Payment History**

Account Administration

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Real Estate

## Brokerage Payment History

Brokerage Statement Reports

Create payment history reports by clicking the Brokerage Statement Reports button.

Maximum of 50 records are retrieved, if you need more details click on the [Brokerage Statement Report link](#)

Current Account Balance: \$ 18285.00

Industry Professional:

From Date:

To Date:



Search

First Name	Last Name	Date	Amount	Payment Type	Actions
Kam	Chancellor (TEST)	13-Mar-16	\$50.00	Broker Credit Account	<a href="#">Receipt</a>
Kam	Chancellor (TEST)	6-Jan-16	\$1300.00	Broker Credit Account	<a href="#">Receipt</a>
Test	Test	9-Dec-15	\$850.00	Broker Credit Account	<a href="#">Receipt</a>
Kam	Chancellor (TEST)	9-Oct-15	\$50.00	Broker Credit Account	<a href="#">Receipt</a>
					<a href="#">Receipt</a>

Search for a payment by name or by date range.



After clicking Brokerage Statement Report, create a custom report for Payment History by time range.

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nce  
Usage Centre  
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Back

Actions | 1 of 1 | Find Next

**Brokerage Statement Report**  
Executed On: Friday, July 8, 2016 1:56:11 PM  
Start Date: June 8, 2016  
End Date: July 8, 2016  
(\*click the actions menu to save the report)

**Test - Keep It Realty (TEST)**  
Current Credit Limit: \$18285.00  
No transaction records found.

Parameters  
Start Date: 6/8/2016  
End Date: 7/8/2016

Select Actions>Export to select a file type for exporting your report.