

Request to Reduce Old Age Security Recovery Tax at Source

Year _____

- Use this form to request to reduce old age security (OAS) recovery if you estimate that your income for the current year will be lower than the previous year.
- **Before you send us your request**, ensure that your income tax returns for the previous years are filed and all amounts owing are paid in full. You must have also received the Notice of assessment issued by Canada Revenue Agency (CRA) for all those years.
- The OAS payments are paid from July 2015 to June 2016. A new request will then have to be submitted if your situation remains unchanged after this period.
- If your request is granted by CRA, the information will be transmitted to Service Canada (SC) who will process the request in approximately two months.
- The recovery tax already withdrawn from your OAS payments will be indicated in Box 22, Income tax deducted, of your T4A(OAS) slip and would have to be reported on Line 437, Total income tax deducted, of your Income Tax and Benefit Return in the year of the payments.
- You may consult Line 235, Social benefits Repayment, and the Federal Worksheet included in the General Income Tax and Benefit Guide to get information on the OAS repayment and its calculation.
- Send the filled out form with all the supporting documents to the Taxpayer Services Division of your tax services office. You can find the address on our Web site at www.cra.gc.ca/tso or by calling us at **1-800-959-8281**. Refer to the General Income Tax and Benefit Guide for information on which supporting documents are required to justify your requested deductions and credits.

Identification			
First name	Last name	Social insurance number	
Address			
City	Province or territory	Postal code	Telephone number
Estimated current-year income from all sources – Page 2 of the income tax return			
Employment income	_____	1	
Old Age Security pension (OAS).	+ _____	2	
Canada Pension Plan (CPP) or Quebec Pension Plan (QPP) Benefits	+ _____	3	
Other pensions and superannuation	+ _____	4	
Taxable amount of dividends from taxable Canadian corporations	+ _____	5	
Interest and other investment income	+ _____	6	
Net rental income (if a loss, show the amount in brackets)	+ _____	7	
Taxable capital gains	+ _____	8	
Registered retirement savings plan (RRSP) income	+ _____	9	
Registered retirement income fund (RRIF) income	+ _____	10	
Other income (specify): _____	+ _____	11	
Estimated total current-year gross income (add lines 1 to 11)	= _____	▶	\$ _____ 12
Deductions from current-year income – Page 3 of the income tax returns			
Carrying charges and interest expenses	_____	13	
Other deductions (specify): _____	+ _____	14	
Total deductions from current-year income (add lines 13 and 14)	= _____	▶	\$ _____ 15
Estimated current year net income (line 12 minus line 15)			\$ _____ 16

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Personal information is collected under the *Income Tax Act* to administer tax, benefits, and related programs. It may also be used for any purpose related to the administration or enforcement of the Act such as audit, compliance and the payment of debts owed to the Crown. It may be shared or verified with other federal, provincial/territorial government institutions to the extent authorized by law. Failure to provide this information may result in interest payable, penalties or other actions. Under the *Privacy Act*, individuals have the right to access their personal information and request correction if there are errors or omissions. Refer to Info Source at www.cra.gc.ca/gncy/tp/nfsrc/nfsrc-eng.html, Personal Information Bank CRA PPU 005.

(Vous pouvez obtenir ce formulaire en français à www.arc.gc.ca/formulaires ou en composant le 1-800-959-7383.)

Non-refundable tax credits in the current year* – Schedule 1 of the income tax return

* We will consider the Basic personal amount, the Age amount and the Pension income amount (where applicable).

Will you be claiming the disability amount?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Will you have eligible medical expenses?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes , specify the amount	_____	17
Will you have eligible charitable donations or government gifts?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes , specify the amount	_____	18
Other non-refundable tax credits (specify): _____	_____	19

Refundable tax credits in the current year

Income tax deducted from OAS benefits	_____	20	
Income tax deducted from CPP, QPP, RRSP and/or RRIF	+ _____	21	
Specify: _____			
Income tax deducted from all other current-year sources	+ _____	22	
Tax instalments paid to date for the current year	+ _____	23	
Total refundable tax credits for current year (add lines 20 to 23)	= _____		\$ _____ 24

Certification

I request Service Canada be authorized to reduce my Old Age Security recovery tax deductions at source based on the information given.
I certify that the information given on this application is correct and complete.

_____ Signature

_____ Date