



## Request to Reduce Old Age Security Recovery Tax at Source

Year \_\_\_\_\_

- Use this form to request to reduce your old age security (OAS) recovery tax 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 the tax returns filed for those years.
- The OAS recovery tax period is from July of the current year to June of the following year. You will need to submit a new request 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- The recovery tax already withdrawn from your OAS payments will be indicated in Box 22, Income tax deducted, of your T4A(OAS) slip and would have to be reported on Line 437, Total income tax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 your taxpayer services regional correspondence centre. You can find the address on page two. Refer to the General Income Tax and Benefit Guide for information on which supporting documents are required to justify your requested deductions and credits. Incomplete forms may result in processing delays.

<b>Identification</b>			
First name	Last name	Social insurance number	
Address			
City	Province or territory	Postal code	Telephone number

<b>Estimated current-year gross income from all sources – Page 2 of the income tax return</b>			
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
<b>Estimated total current-year gross income</b> (add lines 1 to 11) . . . . .	=	_____ ▶	\$ _____ 12

<b>Deductions from current-year income – Page 3 of the income tax returns</b>			
Carrying charges and interest expenses . . . . .	_____	13	
Other deductions (specify): _____ . . . . .	+	_____	14
<b>Total deductions* from current-year income</b> (add lines 13 and 14) . . . . .	=	_____ ▶	\$ _____ 15
<b>Estimated current year net income</b> (line 12 minus line 15) . . . . .			\$ _____ 16

\*The Pension income splitting is not considered a deduction. Do not include income tax deducted or pension income splitting amounts.

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 [canada.ca/cra-info-source](http://canada.ca/cra-info-source), Personal Information Bank CRA PPU 005.

**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? .....  Yes  No

Will you have eligible medical expenses? .....  Yes  No  
 If **yes**, specify the amount ..... 17

Will you have eligible charitable donations or government gifts? .....  Yes  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 RRSP and/or RRIF ..... 20

Income tax deducted from CPP, QPP, and OAS benefits. .... + ..... 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

<b>If you reside in:</b>	<b>Send your request to:</b>
<ul style="list-style-type: none"> <li>• Newfoundland and Labrador</li> <li>• New Brunswick</li> <li>• Nova Scotia</li> <li>• Prince Edward Island</li> </ul>	<p><b>Nova Scotia TSO</b>                      Post Office Box 638, Station Central                      Halifax NS B3J 2T5                      Fax: 902-450-8558</p>
<ul style="list-style-type: none"> <li>• Quebec</li> </ul>	<p><b>Montreal TSO</b>                      305 René-Lévesque Boulevard West                      Montréal QC H2Z 1A6                      Fax: 514-496-5345</p>
<ul style="list-style-type: none"> <li>• Ontario</li> <li>• Nunavut</li> </ul>	<p><b>London TSO</b>                      451 Talbot Street                      London ON N6A 5E5                      Fax: 519-645-4029</p>
<ul style="list-style-type: none"> <li>• Manitoba</li> <li>• Saskatchewan</li> <li>• Alberta</li> <li>• Northwest Territories</li> </ul>	<p><b>Saskatoon TSO</b>                      340 3rd Avenue North                      Saskatoon SK S7K 0A8                      Fax: 306-652-3211</p>
<ul style="list-style-type: none"> <li>• British Columbia</li> <li>• Yukon</li> </ul>	<p><b>Fraser Valley and Northern TSO</b>                      9737 King George Boulevard                      Post Office Box 9070, Station Main                      Surrey BC V3T 5W6                      Fax: 604-587-2010</p>

If you are a **non-resident**, send your request to:  
**Sudbury Tax Centre**, PO Box 20000, Station A, Sudbury,  
 ON, P3A 5C1, CANADA. Fax: 705-671-3994 or 1-855-276-1529.