



# 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**, make sure all of the following apply:
  - you have filed your tax returns for the last three years and we have assessed them
  - you have paid any amounts owing in full
  - you have completed **all areas** of this form
- 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- The recovery tax already withdrawn from your OAS payments will be indicated in Box 22, Income tax deducted, of your T4A(OAS) slip and would have to be reported on Line 43700, Total income tax deducted, of your Income Tax and Benefit Return in the year of the payments.
- 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 Federal Income Tax Guide for information on which supporting documents are required to justify your requested deductions and credits. Incomplete forms may result in processing delays.

## Identification

First name		Last name		Social insurance number	
Address					
City	Province	Postal code	Telephone number		

## Estimated current-year gross income from all sources

Employment income .....	_____	<b>1</b>
OAS Pension – amount before deductions .....	+ _____	<b>2</b>
Canada Pension Plan (CPP) / Quebec Pension Plan (QPP) Benefits ..	+ _____	<b>3</b>
Other pensions and superannuation .....	+ _____	<b>4</b>
Taxable amount of dividends from taxable Canadian corporations ....	+ _____	<b>5</b>
Interest and other investment income .....	+ _____	<b>6</b>
Net rental income (if a loss, show the amount in brackets) .....	+ _____	<b>7</b>
Taxable capital gains .....	+ _____	<b>8</b>
Registered retirement savings plan (RRSP) income .....	+ _____	<b>9</b>
Registered retirement income fund (RRIF) income .....	+ _____	<b>10</b>
Other income (specify): .....	+ _____	<b>11</b>
<b>Estimated total current-year gross income</b> (add lines 1 to 11) .....	= _____	<b>12</b>

## Deductions from current-year income (include supporting documents)

Carrying charges and interest expenses .....	_____	<b>13</b>
Other deductions (specify): .....	+ _____	<b>14</b>
<b>Total deductions* from current-year income</b> (add lines 13 and 14) .....	= _____	<b>15</b>
<b>Estimated current year net income</b> (line 12 minus line 15) .....		<b>16</b>

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

Personal information (including the SIN) is collected for the purposes of the administration or enforcement of the Income Tax Act and related programs and activities including administering tax, benefits, audit, compliance, and collection. The information collected may be used or disclosed for purposes of other federal acts that provide for the imposition and collection of a tax or duty. It may also be disclosed to other federal, provincial, territorial, or foreign 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 a right of protection, access to and correction of their personal information, or to file a complaint with the Privacy Commissioner of Canada regarding the handling of their personal information. Refer to Personal Information Bank CRA PPU 005 on Info Source at [canada.ca/cra-info-source](http://canada.ca/cra-info-source).

**Non-refundable tax credits in the current year \*** (include supporting documents)

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

**Refundable tax credits in the current year**

Income tax deducted from RRSP and/or RRIF. ....	_____	<b>20</b>
Income tax deducted from CPP or QPP .....	+ _____	<b>21</b>
Specify: _____		
Income tax deducted from OAS benefits .....	+ _____	<b>22</b>
(Do not include OAS recovery tax)		
Income tax deducted from all other current-year sources. ....	+ _____	<b>23</b>
(If you are a resident of Quebec, enter only Federal income tax)		
Tax instalments paid to date for the current year .....	+ _____	<b>24</b>
<b>Total refundable tax credits for current year</b> (add lines 20 to 24) ...	= _____	<b>25</b>

**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>	Nova Scotia TSO Post Office Box 638, Station Central Halifax NS B3J 2T5 Fax: 902-450-8558
<ul style="list-style-type: none"> <li>• Quebec</li> </ul>	Jonquière TC 2251 René-Lévesque Boulevard Jonquière QC G7S 5J1 Fax: 418-699-0203
<ul style="list-style-type: none"> <li>• Ontario</li> <li>• Nunavut</li> </ul>	London-Windsor TSO 451 Talbot Street London ON N6A 5E5 Fax: 519-645-4029
<ul style="list-style-type: none"> <li>• Manitoba</li> <li>• Saskatchewan</li> <li>• Alberta</li> <li>• Northwest Territories</li> </ul>	Saskatchewan TSO 340 3rd Avenue North Saskatoon SK S7K 0A8 Fax: 306-652-3211
<ul style="list-style-type: none"> <li>• British Columbia</li> <li>• Yukon</li> </ul>	Fraser Valley TSO 9737 King George Boulevard Post Office Box 9070, Station Main Surrey BC V3T 5W6 Fax: 604-586-6442

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