



# Old Age Security Return of Income

## Identification

First name and initial \_\_\_\_\_

Last name \_\_\_\_\_

Mailing address \_\_\_\_\_

City \_\_\_\_\_

Province/territory or country \_\_\_\_\_ Postal code \_\_\_\_\_

Enter your Canadian social insurance number: \_\_\_\_\_

Your date of birth: Year \_\_\_\_\_ Month \_\_\_\_\_ Day \_\_\_\_\_

Your language of correspondence: English  Français

If individual is deceased, give date of death: Year \_\_\_\_\_ Month \_\_\_\_\_ Day \_\_\_\_\_

On December 31, 2006, you were:  
 1  Married      2  Living common-law  
 3  Widowed      4  Divorced  
 5  Separated      6  Single

If box 1 or 2 applies, enter your spouse or common-law partner's Canadian social insurance number: \_\_\_\_\_

Enter your spouse or common-law partner's first name: \_\_\_\_\_

Tax or pension account number in your country of residence: \_\_\_\_\_

**Do not use this area**

Your Old Age Security number: \_\_\_\_\_

Your country of residence on December 31, 2006: \_\_\_\_\_

If you became or ceased to be a resident of Canada in 2006, give the date of:  
 Entry Month \_\_\_\_\_ Day \_\_\_\_\_ or Departure Month \_\_\_\_\_ Day \_\_\_\_\_

Include your world income on this return. World income is income from all sources both inside and outside Canada.

## Income

Old Age Security pension (see line 113 in the guide) . . . . .	<b>113</b>	_____	_____
Canada or Quebec Pension Plan benefits (see line 114 in the guide) . . . . .	<b>114</b>	+	_____
Other pensions or superannuation (see line 115 in the guide) . . . . .	<b>115</b>	+	_____
Interest and other investment income (from the Worksheet on the back) . . . . .	<b>121</b>	+	_____
Net rental income (see line 126 in the guide) . . . . .	<b>126</b>	+	_____
Registered retirement savings plan income (see line 129 in the guide) . . . . .	<b>129</b>	+	_____
Other income (see line 130 in the guide). Specify: _____	<b>130</b>	+	_____
Net business income (see line 135 in the guide) . . . . .	<b>135</b>	+	_____
Add lines 113 to 135. This is your <b>total world income</b> .	<b>150</b>	=	_____

## Deductions

Carrying charges and interest expenses (see line 221 in the guide)	<b>221</b>	_____	_____
Other deductions (see line 232 in the guide). Specify: _____	<b>232</b>	+	_____
Add lines 221 and 232 . . . . .	<b>233</b>	=	_____

Line 150 minus line 233 (if negative, enter "0"). This is your **net world income**. **242**= \_\_\_\_\_

**Please do not use this area 171**

# Refund or Balance owing

Old Age Security recovery tax (see line 235 in the guide). If line 242 is CAN\$62,144 or less, enter "0". . . . . **235** \_\_\_\_\_ •

Recovery tax withheld (from box 27 of your NR4-OAS slip). . . . . **437** - \_\_\_\_\_ •

Line 235 minus line 437. If the result is negative, you have a **refund** of recovery tax. If the result is positive, you have a **balance owing** of recovery tax. Enter the amount below on whichever line applies.

		=	

Generally, we do not charge or refund a difference of \$2 or less.

**Refund 484** \_\_\_\_\_ •                      **Balance owing 485** \_\_\_\_\_ •

**Amount enclosed 486** \_\_\_\_\_ •

Attach a **cheque or a money order** payable to the Receiver General.

I certify that the information given on this return and in any documents attached is correct, complete, and fully discloses all my income.

Sign here \_\_\_\_\_ (      )  
It is a serious offence to make a false return.                      Date                      Telephone number

## Interest and Other Investment Income Worksheet

State the names of the payers below and attach any information slips you received. If you need more space, attach a separate sheet of paper.

### Interest and dividend income

	+	
	+	
	+	
	=	(i)

Total interest and dividend income

### Capital gains (see line 121 in the guide).

Description of property: _____			
1. Proceeds of disposition	2. Adjusted cost base	3. Outlays and expenses	4. Capital gain (or loss) <small>Box 1 minus boxes 2 and 3</small>

Taxable portion of capital gains (50% of the amount in box 4 above).  
 If the amount in box 4 is negative, enter "0" \_\_\_\_\_ (ii)

Add lines (i) and (ii). Enter this amount on line 121 on the front. = \_\_\_\_\_