

## Tax Checklist: Moving Expenses

Our low tax preparation fee for Moving Expenses is only for those who complete this worksheet. Additional fees will be charged if you do not complete this form. Thank you for your cooperation!

Name: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Tel.: \_\_\_\_\_  
Tax Year: \_\_\_\_\_

### Details of move:

1. Old Residence: \_\_\_\_\_  
Suite # Street City Province Postal Code

New Residence: \_\_\_\_\_  
Suite # Street City Province Postal Code

2. Date of move: \_\_\_\_\_ Circle reason for move: new job / business / studies  
DD / MM / YYYY

3. Date you started new job, business or studies: \_\_\_\_\_

4. Name & address of employer, business or educational institution:

\_\_\_\_\_  
Name Suite # Street City Province Postal Code

### Calculation of Distance:

What is the distance in kilometers between:

- a) old home and new place of work or educational institution \_\_\_\_\_  
b) new home and new place of work or educational institution \_\_\_\_\_

### Calculation of allowable moving expenses:

1. Transportation & storage cost of household effects: \_\_\_\_\_  
Name of Mover: \_\_\_\_\_

2. Travel expenses from old to new residence:  
Travel costs (other than accommodation & meals) \_\_\_\_\_  
# of Household members in move \_\_\_\_\_  
Method of travel (fly, drive, etc.) \_\_\_\_\_  
Accommodation # of nights \_\_\_\_\_ Cost of meals \_\_\_\_\_ # of days \_\_\_\_\_

3. Temporary living expenses near new or old residence (max 15 days): \_\_\_\_\_  
Accommodation # of nights \_\_\_\_\_ Cost of meals \_\_\_\_\_ # of days \_\_\_\_\_

4. Cost of cancelling the lease for the old residence: \_\_\_\_\_

5. Incidental costs related to the move (details & cost): \_\_\_\_\_

6. Costs to maintain your old residence when vacant (maximum \$5,000): \_\_\_\_\_

7. Cost of selling old residence  
Real Estate Commission \_\_\_\_\_ Selling Price \_\_\_\_\_  
Legal & Notary Fees \_\_\_\_\_ Advertising \_\_\_\_\_  
Other Selling Costs \_\_\_\_\_

8. Cost of purchasing new residence:  
Purchase Price \_\_\_\_\_ Legal & Notary Fees \_\_\_\_\_  
Taxes paid for registration or transfer of title \_\_\_\_\_  
(do not include GST/HST or property taxes)

Comments:

\_\_\_\_\_