



Date: ___/___/___
DD/MM/YYYY

Address: _____

Name: _____

It will soon be time to prepare your _____ tax return. Providing complete and accurate information will allow us to prepare your tax return timely and efficiently. With this in mind, we have attached a checklist and questionnaire to assist you gathering the required items.

Your MOVING EXPENSES DEDUCTION

Please enter applicable amounts below and note any questions.

Your Name: _____

_____ Km

Distance in kilometres between your **old** home and your **new** place of work or educational institution.

_____ Km

Distance in kilometres between your **new** home and your **new** place of work or educational institution.

IMPORTANT: Subtract the second distance above from the first distance. If it is less than 40 kilometres, you cannot deduct your moving expenses. If this is the case, do not complete the rest of this form.

Address of old home: _____

___/___/___ DD/MM/YY

Date of move

___/___/___ DD/MM/YY

Date you started your new job or business, or your studies

Main reason for the move

To work or to run a business **OR** To study full time

Information about your employer, business, or educational institution **after** the move:

Name: _____

Complete address: _____

Transportation and Storage

\$_____._____ Transportation and storage costs for your household items

Name of mover (if applicable): _____

Travel expenses (from old home to new home)

_____ Number of household members in move

Method of travel: _____

_____km Number of kilometres

Accommodations/meals - travel

_____ Number of nights

_____ Number of days

_____ Number of meals

\$_____._____ Hotel/accommodation expenses

Accommodations/meals - temporary living expenses near new or old home

_____ Number of nights

_____ Number of days

_____ Number of meals

\$_____._____ Hotel/accommodation expenses

Cost of cancelling the lease for your old home / mortgage penalty

_____._____ Cost of cancelling the lease for your old home / mortgage penalty

Incidental costs related to the move (specify)

_____._____ _____
_____._____ _____
_____._____ _____
_____._____ _____
_____._____ _____

Costs to maintain your old home when vacant

_____._____ Costs to maintain your old home when vacant

Cost of selling old home

_____._____ Selling price
_____._____ Real estate commission
_____._____ Legal and notarial fees
_____._____ Advertising
_____._____ Other selling cost (specify): _____
_____._____ Other selling cost (specify): _____
_____._____ Other selling cost (specify): _____

Cost of purchasing new home

_____._____ Purchase price
_____._____ Legal or notarial fees
_____._____ Taxes paid for the registration or transfer of title (do not include GST/HST)

Signature: _____

Date: _____
Signing date DD/MM/YYYY

Please return completed form to:
Debbie Sitzer Professional Corporation, 9 - 250 Bayview Drive, Barrie, ON L4N 4Y8
Alternatively, scan and e-mail it to debbie@debbiesitzer.com