



# Kerr & Company

CHARTERED PROFESSIONAL ACCOUNTANT

## Kerr & Company's Helpful Hints – Moving Expense Checklist

You can deduct eligible moving expenses from employment or business income you earn at your new location if you move and establish a new home in order to be employed or carry on a business. You can also deduct eligible moving expenses from award income if you move in order to attend courses as a full-time student at a college, university, or other institution offering post-secondary education.

Your new home must be at least 40 kilometres closer to the new place of work or educational institution than your previous home was. You must establish your new home as the place where you ordinarily reside. Generally, your move must be from one place in Canada to another place in Canada.

Your name: \_\_\_\_\_

Complete address of **old** residence: \_\_\_\_\_

\_\_\_\_\_

Complete address of **new** residence: \_\_\_\_\_

\_\_\_\_\_

Date of move: \_\_\_\_\_

*(If the your move was more than one day long, please provide the date you left and the date you arrived)*

Number of household members that moved: \_\_\_\_\_

Number of meals per household member purchased during move: \_\_\_\_\_

Main reason for move:  New job or business  Full time studies

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

Name and address of employer, business, or educational institution **after** move: \_\_\_\_\_

\_\_\_\_\_

Were you reimbursed or paid a tax-free allowance for any of the expenses listed below?  Yes  No

If yes, please provide details: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Please provide us with the receipts for the following expenses if applicable:**

- Amounts paid to a moving company for transportation and storage
- Moving truck rental
- Amounts paid for lodging during your move
- Amounts paid for temporary accommodation near old or new residence (max. 15 days)
- Cost of cancelling the lease of your old residence
- Costs to maintain your old residence when vacant (max. \$5,000 and only if you were making an effort to sell the home). These costs include mortgage interest, property taxes, insurance, and utilities.
- Real estate commissions, advertising expenses, legal fees, and mortgage penalties paid in connection with the sale of your old home
- Legal fees and property transfer taxes paid in connection with the purchase of your new home
- Costs to change your address on legal documents, replace driver's licence, utility hook-ups and disconnections
- Other moving expenses

**Please provide us with the following documents if applicable:**

- Statement of adjustments for the sale of your old home
- Statement of adjustments for the purchase of your new home
- We recommend that you obtain a letters from your old and new employers confirming whether any moving expenses incurred were reimbursed by them, and what portion, if any, was included on your T4 slip

Additional information or comments:

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