PERSONAL TAX SEASON IS HERE!

It's time to get ready to file your tax return! Indeed, personal tax season is already upon us, and Logan Katz is, once again, providing a checklist designed to assist you in compiling your information. The use of this checklist will improve our accuracy in preparing your return(s) and will also reduce turn-around time.

WE ASK THAT YOU KINDLY BRING YOUR COMPLETE INFORMATION TO US AS EARLY AS POSSIBLE, ONCE YOU ARE CERTAIN YOU HAVE RECEIVED ALL YOUR TAX SLIPS FROM THIRD PARTIES. Should you bring your information to us after **Thursday, April 9, 2020**, we will not guarantee the completion of your tax return by the **Thursday, April 30, 2020** filing deadline. Although we will accept your tax information, please note that we will not commence preparing any tax returns beyond **Thursday, April 23, 2020**.

Once your return is successfully E-filed, an electronic copy of your tax return(s) will be made available to you. ***If you prefer a "paper copy" of your return(s) and related documents, please note that there may be an additional fee of $100 included on your invoice.*** Further, if you wish us to return your tax information to you by courier, please indicate on our checklist a courier address where your copy can be sent. Please note that in certain situations, a paper return will be required to be filed by mail to the Canada Revenue Agency (CRA), in which case we will prepare a "tax copy" for you to mail to the CRA.

The CRA is implementing mandatory direct deposit for all refunds that it issues to taxpayers and will be phasing out cheques issued by mail. If you are not already signed up for this service, please refer to our instructions included herein.

You will notice that the various schedules (business, rental, employment expenses, etc.) are in fillable Excel format, rather than Word documents. For all applicable schedules, please enter the appropriate information and email the completed schedules to us. Alternatively, the schedules are also available on the publications page of our website at: https://logankatz.com/resources/#resourcepublications. Select the applicable schedules in the document entitled ***2019 CDN Personal Tax Information***, save them to your computer, complete them, and email them to us.

We ask that you refer to the enclosed payment instruction in regards to the payment of our fees.

Extra copies of the checklist and schedules are available should you know of someone who would like Logan Katz to prepare his/her personal income tax return. Note the checklist is also available in PDF format on our website.

We appreciate your commitment to us and hope you value ours to you, and look forward to working with you!

Logan Katz LLP

LOGAN KATZ LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

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Cette trousse est également disponible en français sur demande.

YOUR NAME: ____

1. **If this is the first year LOGAN KATZ LLP is preparing your return**, please provide copies of your 2017 and 2018 personal income tax returns, and related notices of (re)assessment.

   If you have decided that LOGAN KATZ LLP will not prepare your 2019 personal income tax return, kindly call Stacy Glenn at (613) 228-8282, extension 118, to let us know.

2. If you moved during the year, please provide your new full address, otherwise we will *assume* you have the same address as in 2018 (consider applicability of *Schedules A and G*):

____	______________________	___________________	_________________	_______________
No.	Street/Avenue/Road	Town/City	Province	Postal Code

3. How do you wish us to return your tax information? Please choose one of the following:

   Pick up at Logan Katz LLP offices on Gurdwara Road _____ *
   Courier to address below at your expense) _____

***If this information is not addressed and your original documents are not picked up by August 31, 2020, we will send them to you by regular mail. However, if your information is too large to go by regular mail, it will be couriered to you at your expense.**

If your return(s) has(ve) not been E-filed, it is YOUR responsibility to forward the "paper copy" to the CRA (and Revenu Québec) by the due dates. Please do not assume we will be doing this on your behalf, without making arrangements with us.

If you have chosen to have your tax information returned to you by courier (marked "personal and confidential"), please provide a ***courier*** address. If you are not at home during the day, please provide your work or other address where you can receive the package personally. *A post office box number or rural route number is insufficient for courier purposes*:

____	______________________	___________________	_________________	_______________
No.	Street/Avenue/Road	Town/City	Province	Postal Code

4. Information on you, your spouse and your dependents:

a)

Your Full Name	Your S.I.N.	Your Date of Birth
______________________	____________	__________

Your Spouse's Full Name	Your Spouse's S.I.N.	Your Spouse's Date of Birth
______________________	____________	__________

OR Income of your spouse if we do not prepare her/his tax return: $____________

Dependents - Full Name(s)	Dependents - S.I.N.(s)	Dependents - Date(s) of Birth	Dependents - Income Source and Amount
______________________	____________	__________	$__________
______________________	____________	__________	$__________
______________________	____________	__________	$__________
______________________	____________	__________	$__________

b) Provide the details of any loans, dispositions, and gifts of property to children, spouse or other non-arms length persons (list and provide details of any loans or gifts of money or other property to persons related to you).

Name of Recipient	Nature of Loan or Gift	Amount
______________________	______________________	$__________

c) If you have T5 and/or T3 Slips in your and a child/grand-child's name, please let us know the way in which you would like the income to be allocated.

5. Please provide telephone numbers where we can reach you:

During the day ____________ During evening/weekend ________________

Fax number ____________ E-Mail address ________________

6. If your marital status has changed during 2019, please provide the following details (please differentiate between "married" and "common-law"):

______________________ ______________________

Previous status New status

______________________ ______________________

Date of change SIN of Spouse (if married or common-law, include SIN of new spouse)

Note: A spouse includes a same-sex spouse

7. Did you own or hold foreign property at any time in 2019 with a total **cost** of more than CAD $100,000?

   Yes ______ No _______

   Examples: Foreign bank account; tangible property (real estate/equipment); interest in non-resident trust, including a foreign mutual fund trust; intangible property (rights to royalties, share of Canadian corporation deposited with a foreign broker, etc.); a debt (bond, note, debenture) owed or issued by a non-resident; shares in non-resident corporations. If you do not respond to this point, we will assume ***NO***. **Please note that there are substantial penalties for failing to report this information in your personal income tax return.**

   If you loaned or transferred funds or property to a non-resident trust **or** if you received funds or property from, or have been indebted to, a non-resident trust in which you had or will have absolute or conditional rights as a beneficiary, either directly or indirectly, in 2019, please provide full details and documentation. If you do not respond to this point, we will assume ***NO.*** (Note: **There are substantial penalties for failing to report this information in your personal income tax return.**)

8. Please let us know if you have any objections to the CRA providing, over the next 12 months, your name, address, and date of birth to Elections Canada to help keep up to date your information currently on the National Register for Electors. **Failure to respond to this point will result in our assumption that you have no objections.**

For your convenience, we have the **LK Drop Box** as another way to bring us your personal income tax information, additional information or tax payments outside our regular business hours OR without needing to make an appointment.

The clearly marked **Drop Box** is conveniently located outside the main entrance to our offices, is accessible 24/7 and is as secure as handing your information to us personally.

Direct Deposit Instructions

If you receive at least one of the following payments from the Canada Revenue Agency (CRA), you must sign up for direct deposit:

- Income tax refund
- Goods and Services Tax/Harmonized Sales Tax credit and any similar provincial/territorial payments
- Canada Child Benefit and any similar provincial/territorial payments
- Working income tax benefit
- Deemed overpayment of tax

How to Sign Up

Through your Logan Katz preparer

When you provide the following information, you will be automatically enrolled for Direct Deposit when your personal tax return is electronically filed with the CRA:

Branch number: ___________ (5 digits)	Institution number: ________ (3 digits)	Account number: ___________________ (maximum 12 digits)

Online

If you are registered for My Account, simply log on and following the instructions to sign up for direct deposit. If you are **NOT REGISTERED**, follow these steps:

1. Go to the My Account page on the CRA's website: https://www.canada.ca/en/revenue-agency/services/e-services/e-services-individuals/account-individuals.html ***(Tip: You will need your social insurance number, date of birth, current postal code, and tax returns - this year and last.)***
2. Select "Sign in to a CRA account"
3. There are two options for signing in:

   Option 1 – Using one of our Sign-In Partners
   Log in or register with the same sign-in information you use for other online services (for example, online banking). ***Tip: This option means one less user ID and password to remember.***

   Option 2 – Using a CRA user ID and password
   Log in with your CRA user ID and password, or register.

By phone

To sign up for direct deposit or to change your account information, call **1-800-959-8281**. You will need your:

- social insurance number
- full name and current address, including postal code
- date of birth
- most recent income tax and benefit return, and information about most recent payments from the CRA
- banking information: three-digit financial institution number, five-digit transit number, and your account number

By mail

Fill out the Canada direct deposit enrolment form at https://www.tpsgc-pwgsc.gc.ca/recgen/pdf/canada-eng.pdf, and mail completed form to the address indicated on the form.

Required Information

Income

employment	___	T4 and/or T4A Slip
directors' fees	___	T4 Slip or provide details
old age security pension	___	T4A (OAS) Slip
Canada or Québec pension plan benefits	___	T4A (P) Slip
other pensions or superannuations	___	T4A Slip and/or T4RIF
scholarship, fellowship, bursaries etc.	___	T4A Slip
employment insurance	___	T4E Slip
dividends	___	T5 and/or T3 Slip
interest	___	T5 and/or T3 Slip
RRSP withdrawal / RRIF income	___	T4 RSP Slip and/or T4RIF
profit sharing income	___	T4 PS Slip

Other Income

compound Canada Savings Bonds	___	Series number of bonds
other bonds	___	Details of all bonds held
other investment income (losses)	___	Tax shelters, etc. (T5013, etc.)
rental income and expenses	___	Provide details by completing *Schedule C*
capital gains (losses)	___	Provide details by completing *Schedule A, slip (T5008)*
alimony or separation allowance	___	Provide name, address, and S.I.N. of payor
self employment (business, professional)	___	Provide details by completing *Schedule B*
self employment (farming)	___	Provide details by completing *Schedule F*
other income (tips, foreign source income, etc.)	___	Provide details
WSIB (workers compensation) or social assistance	___	Slips (T5007)
income outside Canada (even if cost is below $100,000)	___	Provide details (source/amounts in foreign currency)
statement of contract income	___	Slips (T5018)
statement of government service contract payments	___	Slips (T1204)
fees for services	___	Slips (T4A)
2019 Ontario Senior Homeowners' Property Tax Grant received	___	

DEDUCTIONS

employment expenses:		
- automobile	___	Signed copy of T2200 form and provide details by completing *Schedule D*
- home office	___	Signed copy of T2200 form and provide details by completing *Schedule E*
- other	___	Signed copy of T2200 form and provide details
registered retirement savings plan (RRSP)	___	Receipts for contributions
	___	Home Buyers' Plan ("HPB") withdrawals
	___	Lifelong Learning Plan ("LLP") withdrawals
union or professional dues	___	Receipts or T4 slip
tuition (available on most institutions' websites)	___	T2202A slip and/or tuition receipt*
interest paid on student loans (under the Canada Student Loan Act or provincial equivalent)	___	Amount and/or bank slip
child care expenses	___	Attach receipts Include: S.I.N. and address of child care provider; number of weeks, if for sleepover summer camps
allowable business investment losses	___	Amount invested, proceeds, details
moving expenses	___	Provide details by completing *Schedule G*
alimony or separation allowance	___	Details, incl. name and S.I.N. of recipient
interest expense/carrying charges on investments	___	Details of investments
medical expenses including insurance premiums and amounts reimbursed	___	Receipts, patient name, amounts for attendants, name of insurer
charitable donations	___	Official receipts (registered charities only)
federal and provincial political donations	___	Receipts
contribution to a Labour-sponsored Fund	___	Official receipt (T5006)
Ontario Seniors' Public Transit Tax Credit	___	**If 65 or over, provide monthly cost for the full year.**
first time home buyers credit	___	Address, Acquisition date
let us know if you are a volunteer firefighter	___	
eligible Educator School Supply Tax Credit	___	Attach eligible supplies expense certification (from your employer)
eligible expenses for the Home Accessibility Tax Credit	___	Attach receipts
Adoption in expenses	___	Details
other	___	Details

Inform us of any special living conditions (e.g. providing support to an adult child or parent, etc.)

∗ ***More examination fees now qualify for the tuition amount. In addition, the minimum duration of courses taken at a university outside Canada has been reduced to three (3) consecutive weeks.***

Other Important Information

1. Did you make tax instalments for 2019? ___ If yes, provide summary of instalments

2. Details regarding rent or property taxes paid ___ Plus name of landlord or municipality

3. If you are claiming entertainment and promotion expenses as a deduction, please segregate the cost of meals, theater tickets, and sports events as you are only permitted to deduct 50% of the cost of these items incurred during the year. **Please also note that the cost of golf green fees is not deductible** (refer to *Schedule B*).

4. If you realized a capital gain/loss on the disposal of a capital asset (real estate, shares, other assets) during 2019, we need to know both the date of acquisition as well as the date of sale (please complete *Schedule A*).

5. If you purchased or leased an automobile during the year for which you are claiming employment or business expenses, please provide a copy of the purchase or lease contract (refer to *Schedule D*).

6. If you wish to donate part or all of your refund to the Ontario Opportunities Fund, to be applied to help reduce Ontario's deficit and debt, please provide an amount: $ _______. We will assume your answer is $0 if you do not specifically address this question.

7. If you or one of your dependants is disabled, please provide a copy of Form 2201 - Disability Tax Credit Certificate.

Disposition of Principal Residence

As you know, the sale of a principal residence (PR) in Canada is not subject to tax as it qualifies for the Principal Residence Exemption (PRE).

In the past, legislation required the disposition of a PR to be reported on a Canadian Personal Tax Return; however, CRA did not administratively enforce this requirement. As such, tax practitioners would typically not report the sale of PR's on personal income tax returns, without any consequences.

You are required – legally and administratively – to report the disposition of a PR on your personal income tax return AND to designate the PRE to the gain. Completion of Form T2091(IND) – *Designation of a Property as a Principal Residence by an Individual* is required. Failure to do so will result in the CRA denying the PRE on the disposition and, as such, assessing tax on the gain.

As a result of this very significant change, if applicable, please ensure you include all information in regards to the disposition of a PRE on Schedule A.

PLEASE SEE THE FOLLOWING SCHEDULES A - G
(also found on our website https://logankatz.com/resources/#resourcepublications)
AND DETERMINE WHETHER THEY ARE APPLICABLE TO YOUR SITUATION.

FAILURE TO COMPLETE THE SCHEDULES WILL INCREASE FOLLOW-UP TIME AND COSTS TO COMPLETE YOUR INCOME TAX RETURN(S).

Schedule A – Capital Gains (Losses)

(Please fill out excel spreadsheet on our website at https://logankatz.com/resources/#resourcepublications)

Description of asset disposed of in 2019: ____

Date of acquisition: ________________ , 19____ / 20 ___

Date of disposal: ________________ , 2019

Original cost of asset $_______________

Proceeds on disposal $_______________

Outlays of cash upon disposal
(i.e. broker, lawyer, other) $_______________

Description of asset disposed of in 2019: ____

Date of acquisition: ________________ , 19____ / 20 ___

Date of disposal: ________________ , 2019

Original cost of asset $_______________

Proceeds on disposal $_______________

Outlays of cash upon disposal
(i.e. broker, lawyer, other) $_______________

Description of asset disposed of in 2019: ____

Date of acquisition: ________________ , 19____ / 20 ___

Date of disposal: ________________ , 2019

Original cost of asset $_______________

Proceeds on disposal $_______________

Outlays of cash upon disposal
(i.e. broker, lawyer, other) $_______________

REMINDER: Remember to please contact your financial advisor/broker as soon as possible to authorize them to provide Logan Katz LLP staff with any information we may be requesting when preparing your personal income tax return. It becomes extremely time-consuming to have to do this at the height of tax season, both for the accountant and for the broker. Also, please provide the following:

Name of Broker: ____

Telephone No: ____

Email address: ____

FAILURE TO PROVIDE COMPLETE INFORMATION WILL RESULT IN EXTRA FEES.

Schedule B – Statement of Net Business or Professional Income

(Please fill out excel spreadsheet on our website at https://logankatz.com/resources/#resourcepublications)

Name of business: ____

Year ended: ______________, 2019 Business number (if applicable) ____________________

REVENUE (Amount includes HST collected yes ☐ no ☐) $ __________

EXPENSES (Amounts include HST paid yes ☐ no ☐)

Advertising		$ __________
Meals and entertainment (limited to a 50% deduction)	Gross _________ 50%	__________
Bad debts		__________
Insurance (identify life and disability insurance separately)		__________
Interest, bank charges (note: interest and penalties for late taxes and source deductions are not deductible)		__________
Business tax, fees, licenses, dues, memberships, subscriptions		__________
Office		__________
Supplies		__________
Legal, accounting and other professional fees		__________
Management and administration fees		__________
Rent		__________
Maintenance and repairs		__________
Salaries		__________
Property taxes		__________
Travel		__________
Telephone and utilities		__________
Fuel costs (except for motor vehicles)		__________
Delivery, freight, express		__________
Motor vehicle (business portion only) (provide amount or complete *Schedule D*)		__________
Other (please specify): ________________________________		__________
Premiums paid to a private medical plan		__________
Opening inventory balance		__________
Closing inventory balance		__________
Home office expenses (Please complete *Schedule E*)		__________
Capital expenditures:	Furniture and Fixtures	$ __________
	Vehicles **see (2)**	__________
	Computer equipment	__________
	Computer software	__________
	Other (please specify)	__________

Schedule B – Statement of Net Business or Professional Income (continued)

(1) Goods and Services Tax	YES	NO	N/A
Are you registered for HST?	☐	☐	☐
If yes, do you collect and remit HST on all your revenue sources?	☐	☐	☐
If no, identify sources which are not subject to HST (except interest): ________________________			
Do you claim ITC's on HST paid on expenses?	☐	☐	☐
If yes, have you provided your expenses excluding the HST?	☐	☐	☐
How often do you file? ____________________________			
Do you use the Quick Method?	☐	☐	☐

Please provide the following details [or provide a copy of your HST return filed for 2019]:

Revenues (excluding HST)	$___________
HST collected	___________
HST remitted to CRA (including instalments)	___________

(2) For each vehicle purchased or leased during the year, it is extremely important that you provide the following:

- ❑ Make and year of vehicle;
- ❑ Cost before HST, PST;
- ❑ Amount of HST and PST;
- ❑ Monthly payment amount;
- ❑ Trade-in amount (if applicable);
- ❑ Year and make of vehicle traded-in;
- ❑ **If available, please provide the purchase or lease documents.**

(3) If your business earns income from one or more web pages or websites, you are required to report the number of web pages or websites. In addition, you must list the URL addresses for the top five internet web pages or websites from which you generate income.

http:// ____

http:// ____

http:// ____

http:// ____

http:// ____

Percentage of your gross income from the web pages and websites: _____ %

(4) Businesses whose physical activity is **construction** are required to report to CRA the name of, amount paid to, and identifier number (Business Number or S.I.N.) of their subcontractors. These should be recorded on Form T5018, under the ***Contractor Reporting System***.

(5) If your business has carried out activities in the United States, please provide details to your Logan Katz LLP preparer to determine whether U.S. filings are required and/or whether you should claim treaty protection under the Canada-U.S. Tax convention.

(6) A self-employed taxpayer carrying on business may be entitled to various provincial tax credits. Provide details of any Apprentices or co-op students you have employed during the year.

Schedule C – Statement of Net Rental Income

(Please fill out excel spreadsheet on our website at https://logankatz.com/resources/#resourcepublications)

(Please prepare one Schedule C for EACH property)
(Make copies as needed)

Address of rental property: ____

Rental income for the year $__________

Expenses:

Advertising	$__________
Insurance	__________
Interest	__________
Office expenses (see "Tax Tip" on Schedule E)	__________
Legal, accounting, other professional fees	__________
Management and administration fees	__________
Repairs and maintenance	__________
Salaries, wages, and benefits	__________
Property taxes	__________
School taxes	__________
Travel	__________
Utilities	__________
Motor vehicle expenses	__________
Other (Please specify): ____________________	__________

Please provide a list of any improvements or assets purchased during the year.

If you purchased a new rental property during the year, it is extremely important that you provide the following:

- Full address
- Cost (before HST) of the building and HST (you should also provide cost of land, separately)
- Percentage to be attributed to yourself, spouse, or other
- **If available, please provide the purchase documents**

If the property was sold during the year, please provide the closing documents.

Schedule D – (Self-) Employment Expenses: Allowable automobile expenses

(Please fill out excel spreadsheet on our website at https://logankatz.com/resources/#resourcepublications)

(if claimed on employment income, you must provide a Form T2200 signed by your employer)

For each vehicle, provide the following:

	Vehicle A	Vehicle B	Vehicle C
Make of automobile	___________	___________	___________
Date acquired	_____, 20___	_____, 20___	_____, 20___
Manufacturer Suggested Retail Price (MSRP)	$ ___________	$ ___________	$ ___________
Number of **Km** driven to earn (self-) employment income (you must exclude km's to/from your home)	_________km	_________km	_________km
Total **Km** driven in the year	_________km	_________km	_________km

Expenses:

Fuel	$___________	$___________	$___________
Interest and finance charges (certain limits apply)	___________	___________	___________
Insurance	___________	___________	___________
Licensing or registration	___________	___________	___________
Maintenance and repairs	___________	___________	___________
Leasing costs (certain limits apply)	___________	___________	___________
Other (Please specify): __________________	___________	___________	___________

For each vehicle purchased or leased during the year, it is extremely important that you provide the following:

- Make and year of vehicle;
- Cost before HST, PST;
- Amount of HST and PST;
- Trade-in amount (if applicable);
- Year and make of vehicle traded-in;
- For leased vehicles, the Manufacturers Suggested Retail Price (MSRP)
- **If possible, please provide a copy of the purchase or lease documents**.

Total amount reimbursed by employer for vehicle during year (*N/A if self-employed*) $_________

REMINDER: Remember that the CRA requires you to keep a detailed log outlining dates, number of kilometres, and destinations to allow for a deduction of vehicle expenses.

Schedule E – (Self-) Employment Expenses: Work space in the home expenses

(if claimed on employment income, you must provide a Form T2200 signed by your employer)

Area of house used for business purposes (**square footage**) ___________

Total area of house (**square footage**) ___________

Expenses:

Heat	$__________	
Hydro	__________	
Insurance	__________	
Repairs and maintenance	__________	
Rent	__________	
OR		
Mortgage interest - exclude principal payments (if self-employed only)	__________	**
Water	__________	
Property taxes	__________	
Other (Please specify): ________________________	__________	

** **Please provide your mortgage statement for 2019**,
if your financial institution has supplied this information.

REMINDER: Remember that home office expenses can only be claimed if an area of your home is your principal place of business; or the space is used exclusively for the purpose of earning income from business, and is used on a regular and continuous basis for meeting the clients, customers or patients of your business.

TAX TIP: According to a 2002 District Office Memo at CRA, it appears **home office expenses** can be claimed against rental income. Accordingly, if you are reporting rental income on schedule C of this package, we encourage you to complete this schedule as well.

Schedule F – Statement of Net Farming Income

(Please fill out excel spreadsheet on our website at https://logankatz.com/resources/#resourcepublications)

Revenues:

Wheat	$__________
Oats	__________
Barley	__________
Mixed grains	__________
Flaxseed	__________
Canola	__________
Soya beans	__________
Corn	__________
Fruits and vegetables (please specify)	__________
Forage crops	__________
Livestock	
- Cattle	__________
- Swine	__________
- Poultry	__________
- Sheep and lambs	__________
Eggs	__________
Milk and cream	__________
Custom & contract work & machine rental	__________
Patronage dividends	__________
Dairy subsidies	__________
Insurance proceeds	__________
Other (please specify): ________________________	__________
Total income	$_________

Schedule F – Statement of Net Farming Income (continued)

Expenses:

Building and fence repairs	$__________
Clearing or leveling, and draining	__________
Irrigation / drainage	__________
Containers, twine & bailing wire ____	
Crop insurance, GRIP, and stabilization premiums	__________
Machinery & truck expense	
- Gasoline, diesel fuel & oil	__________
- Repairs, license, insurance	__________
Insurance - building, livestock	__________
Interest on real estate mortgage	__________
Interest - other	__________
Motor vehicle expenses	__________
Property taxes	__________
Rent (land, buildings, pasture)	__________
Salaries (including CPP, QPP, EI, WSIB)	__________
Custom & contract work & machine rental	__________
Freight & trucking	__________
Electricity	__________
Feed, supplements, straw, bedding	__________
Fertilizers & lime	__________
Heating fuel	__________
Livestock purchased	
- Cattle	__________
- Swine	__________
- Poultry	__________
- Sheep and lambs	__________
Herbicides, pesticides, insecticides, fungicides	__________
Seeds and plants	__________
Veterinary fees, medicine & breeding fees	__________
Small tools	__________
Accounting, legal, office, advertising, memberships	__________
and subscriptions	__________
Telephone	__________
Other (please specify): _________________________________	__________
Total expenses	$_________
Fair market value of inventory at December 31, 2019	$_________

Schedule G – Schedule of Moving Expenses

(Please fill out excel spreadsheet on our website at https://logankatz.com/resources/#resourcepublications)

Criteria: Must have moved at least 40 Km to earn employment or self-employment income or to study in an educational institution.

	Former address in full	New address in full
Address	___________________	___________________
City, Prov.	___________________	___________________
Postal Code	___________________	___________________

Date of move: ___________, 2019

	Former employer, business or educational institution	New employer, business or educational institution
Name	___________________	___________________
Address	___________________	___________________
City, Prov.	___________________	___________________
Postal Code	___________________	___________________

Distance from former residence to new work or study location _____ Km
Distance from new residence to new work or study location _____ Km

Costs:

Moving of household effects (mover: __________)	$__________
Transportation costs from former residence to new residence (Mode of travel: ___________)	
Travel costs (# of km: _____)	__________
Lodging (# of nights: _____)	__________
Meals (# of days: _____)	__________
Temporary living expenses near new or old location (max. 15 days)	
Lodging (# of nights: _____)	__________
Meals (# of days: _____)	__________
Cost of lease settlement	__________
Selling costs of former residence (selling price: $ _____)	
Real estate commission	__________
Legal or notarial fees	__________
Advertising	__________
Other (please specify): ________________________________	__________
Purchase costs of new residence	
Legal fees	__________
Taxes (registration or transfer of title)	__________
Total expenses	$_________
Amount reimbursed by employer (if Nil, please state)	$_________