



MOVING EXPENSES WORKSHEET

There are two methods (detailed and simplified) for calculating your meals and vehicle expenses. If you choose detailed you must keep all your receipts and records for meals and vehicles and claim the actual amount spent. If you use the simplified method we will calculate based on KM and per person. Although detailed records are not required, CRA may still request proof in the form of receipts. Please attach receipts relating to your move.

Distance in Kilometres between your **old** home and your **new** place of work/school _____

Distance in Kilometres between your **new** home and your **new** place of work/school _____

Old Address: _____

New Address: _____

SIN # of Partner(s): _____

Date of Move: _____ MM/DD/YY

Date you started new job/school _____ MM/DD/YY

Name and Address of New Employer/School _____

Expenses

Mover \$ _____ Cost of selling old home \$ _____

Temporary Living expenses \$ _____ Cost of purchasing new home \$ _____

Meals \$ _____ Other: _____ \$ _____

Method of travel: _____

Reimbursement Received: \$ _____

Income earned at new location \$ _____

Other:



SANDRA SCHOFIELD
Chartered Professional Accountant

Confirmation of Receipts

Canada Revenue Agency requires you to keep financial records for a business, rental property or employment expenses.

I, _____, acknowledge that I have kept receipts, invoices, and any other documentary evidence that supports an item of income, deduction or credit as shown on the summary worksheets provided to Sandra Schofield, CPA to complete my 20____ tax return.

Signature

Date

The CRA says you can use any recordkeeping system as long as it “clearly shows your income and expenses”.

The CRA accepts digital copies of documents, as long as they’re identical to the original copies. (This means you must be able to produce a printed, legible copy of the document for them upon request.)

Digitizing your records is also a great way to avoid accidentally tossing them in a move or an overzealous fit of spring cleaning. Plus, let’s not forget that paper records can fade, and are susceptible to damage. Telling the CRA that “the dog ate my tax records” simply won’t fly.

We recommend scanning every record and receipt in your business, tagging it with a descriptive name, and archiving it forever.

Here are some tools that can make digital recordkeeping easier:

- Secure cloud storage services like Dropbox, Evernote, or Google Drive. Any of these websites will support scanning and storing.
- A dedicated business document scanner (these machines can process large numbers of documents at once and take care of the filing process for you, saving you hours of work).
- A dedicated receipt app such as Receipt Bank – ask us for more info

If you do end up going the paperless route, remember to keep a backup copy of your documents in a secure second location, like a password-protected hard drive, or a secondary cloud storage service.

If you have any questions about keeping receipts, please ask us for more information.