

# CLIENT MOVE / RESIDENCE INFORMATION

Complete when a personal tax client moved or changed province/territory during the tax year.



## CLIENT IDENTIFICATION

|                   |                      |               |                      |
|-------------------|----------------------|---------------|----------------------|
| Client legal name | <input type="text"/> | Tax year      | <input type="text"/> |
| SIN               | <input type="text"/> | Date of birth | <input type="text"/> |
|                   |                      | Phone         | <input type="text"/> |

## MOVE DETAILS

|                            |                      |                                  |                              |                             |
|----------------------------|----------------------|----------------------------------|------------------------------|-----------------------------|
| Date you moved             | <input type="text"/> | Was this your primary residence? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Reason for move (optional) | <input type="text"/> |                                  |                              |                             |

## PREVIOUS ADDRESS

|                |                      |                      |                      |
|----------------|----------------------|----------------------|----------------------|
| Street address | <input type="text"/> |                      |                      |
| City / town    | <input type="text"/> | Province / territory | <input type="text"/> |
| Postal code    | <input type="text"/> | Country              | <input type="text"/> |

## NEW / CURRENT ADDRESS

|                |                      |                      |                      |
|----------------|----------------------|----------------------|----------------------|
| Street address | <input type="text"/> |                      |                      |
| City / town    | <input type="text"/> | Province / territory | <input type="text"/> |
| Postal code    | <input type="text"/> | Country              | <input type="text"/> |

## MAILING ADDRESS

|                                                      |                                                    |
|------------------------------------------------------|----------------------------------------------------|
| <input type="checkbox"/> Same as new/current address | <input type="checkbox"/> Different mailing address |
| If different, mailing address                        | <input type="text"/>                               |

## DECEMBER 31 RESIDENCE

Province / territory where you lived or were considered resident on December 31 of the tax year:

# CLIENT MOVE / RESIDENCE INFORMATION

Residence status, CRA address update and office follow-up.



## ADDITIONAL RESIDENCE INFORMATION

Province / territory where you live now, if different from mailing address:

If self-employed: province(s)/territory(ies) where the business had a permanent establishment:

## RESIDENCY CHANGE - ONLY IF APPLICABLE

☐ Became a resident of Canada during the tax year

☐ Ceased to be a resident of Canada during the tax year

Date of entry to Canada

Date of departure from Canada

Country moved from / to

## CRA ADDRESS UPDATE

☐ CRA address already updated

☐ CRA address still needs to be updated

☐ Client will update through CRA My Account

☐ Office follow-up / other update method

## RELATED TAX CONSIDERATIONS

☐ Review possible moving expense eligibility

☐ Principal residence information may be required

☐ Review benefit / credit address implications

☐ Province / territory changed during tax year

## ADDITIONAL NOTES

## CLIENT CONFIRMATION

I confirm the move, address and residence information above is accurate to the best of my knowledge.

Client name / authorized representative

Date

## FOR OFFICE USE

Reviewed by

Date

☐ Tax file updated

CRA address follow-up / notes