

**MOVING EXPENSES-2023**  
*No longer deductible for Federal purposes, unless military*  
*Still available for state returns*

MILES FROM FORMER RESIDENCE TO NEW JOB \_\_\_\_\_ MILES  
MILES FROM FORMER RESIDENCE TO FORMER JOB \_\_\_\_\_ MILES  
*(The difference between these two figures must be over 50 miles to qualify for deductible moving expenses)*

DATE OF MOVE \_\_\_\_\_  
WAS THIS MOVE EMPLOYMENT RELATED? \_\_\_\_\_  
WHEN DID YOU LAST INCUR DEDUCTIBLE MOVING EXPENSES? \_\_\_\_\_  
DID YOU SELL A PERSONAL RESIDENCE IN CONNECTION WITH THIS MOVE? \_\_\_\_\_

IF YOU SOLD A PERSONAL RESIDENCE, WAS IT YOUR PRIMARY RESIDENCE 2 OF THE 5 YEARS PREVIOUS TO THE SALE? \_\_\_\_\_

WAS YOUR PERSONAL RESIDENCE SOLD BEFORE FULFILLING THE 2 YEAR RESIDENCY REQUIREMENT BECAUSE OF UNFORESEEN CIRCUMSTANCES? \_\_\_\_\_  
IF SO, PLEASE EXPLAIN \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**TRANSPORTATION OF HOUSEHOLD & PERSONAL ITEMS:**

*(PLEASE INCLUDE COST OF PACKING, CRATING, STORAGE, SHIPPING & U - HAUL RENTAL)* \_\_\_\_\_

**TRAVEL TO NEW RESIDENCE:**

TRAVEL \_\_\_\_\_  
LODGING \_\_\_\_\_  
MEALS \_\_\_\_\_  
GASOLINE / OIL \_\_\_\_\_

**RELOCATION ALLOWANCE FROM EMPLOYER:** \_\_\_\_\_ **IN W-2?** \_\_\_\_\_

**ADDITIONAL INFORMATION OR MISCELLANEOUS QUESTIONS:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**\*\*NOTE\*\* IF FURNISHED, PLEASE PROVIDE ALLOCATION FORM OF MOVING EXPENSES REIMBURSED BY YOUR COMPANY. ALSO, IF YOU SOLD AND/ OR ACQUIRED A PERSONAL RESIDENCE, PLEASE PROVIDE SALES/PURCHASE ESCROWS.**

**IF YOU HAVE MOVED FROM/TO OUT OF STATE WE CAN PREPARE ANY NECESSARY OUT OF STATE RETURNS**

**DATES OF RESIDENCY:**  
Prior State of residence \_\_\_\_\_ **From:** \_\_\_\_\_ **To:** \_\_\_\_\_  
Current State of residence \_\_\_\_\_ **From:** \_\_\_\_\_ **To:** \_\_\_\_\_