

Richard Kosick & Co.
Principal Residence and Moving Expenses

| PRINCIPAL RESIDENCE DESIGNATION | MOVING EXPENSES |
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| <p>Do you own more than 1 real estate property? <input type="checkbox"/> No <input type="checkbox"/> If yes, complete below</p> <p>Have you sold/gifted/transferred a real estate property before? <input type="checkbox"/> No <input type="checkbox"/> If yes, complete below</p> <p>Have you sold/gifted/transferred a real estate property in 2016? <input type="checkbox"/> No <input type="checkbox"/> If yes, complete below</p> <hr/> <p>Property 1: Address City, province _____ Postal code _____ Percent of ownership _____</p> <p>Seller Statement of Adjustments If above is missing: Year sold (e.g. 2014) _____ Proceeds <input type="checkbox"/> Unknown <input type="checkbox"/> Yes, \$ _____</p> <p>Buyer Statement of Adjustments If above is missing: Year bought (e.g. 1972) _____ Original cost: if bought after 1971 <input type="checkbox"/> Unknown <input type="checkbox"/> Yes, \$ _____ Value: if owned prior 1971 <input type="checkbox"/> Unknown <input type="checkbox"/> Yes, \$ _____</p> <p>Other Tax Considerations: Elected for 1994 capital gains? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure Elected as principal residence? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure Years resided (e.g. 1972-2007) _____ Years rented (e.g. 2007-2014) _____</p> <hr/> <p>Property 2: Address City, province _____ Postal code _____ Percent of ownership _____</p> <p>Seller Statement of Adjustments If above is missing: Year sold (e.g. 2014) _____ Proceeds <input type="checkbox"/> Unknown <input type="checkbox"/> Yes, \$ _____</p> <p>Buyer Statement of Adjustments If above is missing: Year bought (e.g. 1972) _____ Original cost: if bought after 1971 <input type="checkbox"/> Unknown <input type="checkbox"/> Yes, \$ _____ Value: if owned prior 1971 <input type="checkbox"/> Unknown <input type="checkbox"/> Yes, \$ _____</p> <p>Other tax considerations: Elected for 1994 capital gains? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure Elected as principal residence? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure Years resided (e.g. 1972-2007) _____ Years rented (e.g. 2007-2014) _____</p> | <p>Old address _____ City, province _____ Postal code _____</p> <p>New address _____ City, province _____ Postal code _____</p> <p>Employer, school address _____ City, province _____ Postal code _____</p> <p>Date of move _____ Date started job, business, or study _____ Number of household _____ Reimbursement, allowance¹ _____</p> <p>Expenses</p> <p>Transportation, storage costs Packing _____ Hauling, movers _____ In-transit storage _____ Insurance _____</p> <p>Travel expenses Meals _____ Accommodation _____</p> <p>Temporary living expenses² _____ Cost of cancelling old home lease _____</p> <p>Incidental costs Changing address on legal docs _____ Replacing driving licences _____ Utility hook-ups, disconnections _____</p> <p>Cost to maintain vacant home Interest _____ Property taxes _____ Insurance premiums _____ Heating & utilities _____</p> <p>Cost of selling old home Real estate commission _____ Notary or legal fees _____ Advertising _____ Mortgage penalty _____ Other _____</p> <p>Cost of buying new home³ Legal or notary fees _____ Taxes paid on title transfer⁴ _____</p> |

¹ For moving from employer
² Max 15 days
³ Eligible if you or your spouse sold old home because of your move.
⁴ Excluding GST