MR 2000

California State University
SAN MARCOS

MOVING/RELOCATION EXPENSE SUMMARY

Effective Start Date	Employee Name – First, MI, Last

Social Security Number	College/Division and Department

Moving From:

Address	City/State	Zip

Moving To:

Address	City/State	Zip

Indicate Expenses:

Description	Employer Reimbursable to Employee	Employer Paid Directly to Third Party
Transportation and storage of household goods and personal effects		
Travel and lodging expenses directly related to move or relocation (do not include meals)		
All other payments - list type and amount These amounts must be included in the employee's income and are subject to withholding (i.e. meals)		
TOTAL REIMBUSEMENTS	0.00	0.00

Reportable Moving Expenses -

Non Taxable Income (when Federal and Distance test is met)	**Taxable Income** (taxes are approximately 39.25%)
• Reasonable costs of moving household goods and personal effects from former residence to new residence. • Reasonable costs of travel and lodging incurred by the employee from the former residence to the new residence.	• Storage more than 30 days after moving into the new residence • All meals associated with the move • Pre-move house hunting trips • Temporary living expenses • Sale or purchase of residence • Mileage reimbursement in excess of the federal moving expense mileage rate • Moving expenses that do not meet the time or distance tests

Prepared By:	Date	Employee Signature:	Date

The University does not provide tax advice. Please contact a qualified tax professional for any tax related questions or concerns.

Revised: 04/15/2010