

Meeting Documentation

Personal Residence Rental to Business

Property & Owner Information

Owner Name: _____

Business Name: _____

Property Address (Personal Residence):

Meeting Details

Date of Meeting: _____

Rental Day Count for Current Year (Including This Day):

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14

Type of Meeting (check one):

- ☐ Employee Training
☐ Leadership / Management Meeting
☐ Annual Planning / Budget Review
☐ Other: _____

Business Purpose: Brief description of the business purpose for this meeting:

Attendees: List of attendees (staff, owners, or advisors):

Meeting Agenda Summary

Topics discussed (bullet points are fine):

- _____
 - _____
 - _____
 - _____
-

Rental Information

Daily Rental Rate Charged to Business: \$ _____

How was this rate determined?

- ☐ Local meeting space rates
- ☐ Short-term rental comparisons
- ☐ Other reasonable method: _____
-

Payment Details

Payment Method:

☐ Business check ☐ ACH / bank transfer ☐ Other: _____

Date Paid by Business: _____

Memo / Description Used:

Owner Acknowledgment

I confirm that:

- This meeting was held for legitimate business purposes
- The property listed is my personal residence
- Total rental days will not exceed 14 during the calendar year
- The rental rate charged is reasonable and supportable

Owner Signature: _____

Date: _____

Created and provided by Medari Advisors, LLC to help clients properly document use of the Augusta Rule. This form is intended as a general guide and should be reviewed with your tax advisor to ensure compliance.