

Schedule a business meeting at your home (e.g., strategy review, financial planning).

Document the meeting date, time, location, attendees, and agenda in the meeting minutes template.

Include a formal motion in the minutes approving the rental of your home for business use at fair market rate.

Have all meeting attendees sign the minutes.

Create an invoice using your invoice master template with your personal details as the payee.

List the rental date, property address, hours/days rented, and total amount due (based on local market rate)

Send the invoice to your business for payment. (Invoice Master)

Transfer the invoice amount from your business bank account to your personal account.

Save proof of payment (e.g., bank transfer confirmation, check copy).

Update a tracking log (e.g., spreadsheet) to record the rental date and number of days used.

Ensure you do NOT exceed 14 total rental days in the calendar year.

Store all documents (minutes, invoice, payment proof) in a secure folder.

Confirm the rental rate matches local market averages (e.g., check Airbnb/Vrbo for comparable rates).

Verify the meeting had a legitimate business purpose (no personal events).

Update your bookkeeping spreadsheet with the rental income and payment details.

NOTE FOR BOOKKEEPER Transfer: \$1,423.24 [Business Account] → Personal on [Date] for Augusta Rule rental payment. Docs: Invoice #[Number] + minutes are saved. Categorize as rental expense.

Invoice made in Invoice Master