
Business Travel Expense Report Template

Free download from [Holdings](#) — AI-native business banking with free checking, AI bookkeeping, 1.75% APY, and up to \$3M FDIC insurance through i3 Bank, Member FDIC.

Use this template for every business trip to ensure proper documentation and maximize your tax deductions. Keep completed reports for at least 3 years.

Trip Information

Employee/Business Owner: _____

Business/Department: _____

Trip Destination(s): _____

Departure Date: _____ Return Date: _____

Total Trip Days: _____ Business Days: _____ Personal Days: _____

Business Purpose

Primary purpose of trip:

Specific business activities:

- Day 1: _____
- Day 2: _____
- Day 3: _____
- Day 4: _____
- Day 5: _____

Clients/contacts met: _____

Expected business outcomes: _____

Transportation Expenses

Airfare/Train/Bus

Date	Route	Carrier	Ticket #	Amount	Receipt ✓
	→			\$	<input type="checkbox"/>
	→			\$	<input type="checkbox"/>

Ground Transportation

Date	Type (taxi/uber/rental)	From → To	Business Purpose	Amount	Receipt ✓
		→		\$	<input type="checkbox"/>
		→		\$	<input type="checkbox"/>
		→		\$	<input type="checkbox"/>
		→		\$	<input type="checkbox"/>

Personal Vehicle (if driven)

Total business miles: _____ × \$0.67 = \$ _____

OR (if using actual expense method):

Total vehicle expenses: \$ _____

Business percentage: _____ % = \$ _____

Transportation Subtotal: \$ _____

Lodging Expenses

Date	Hotel/Location	Room Rate	Taxes/Fees	Total	Receipt ✓
		\$	\$	\$	<input type="checkbox"/>
		\$	\$	\$	<input type="checkbox"/>
		\$	\$	\$	<input type="checkbox"/>
		\$	\$	\$	<input type="checkbox"/>

Lodging Subtotal: \$ _____

Meal Expenses

Choose ONE method:

Method 1: Actual Expenses (keep all receipts)

Date	Restaurant/Location	Business Purpose	Attendees	Amount	Receipt ✓
				\$	<input type="checkbox"/>
				\$	<input type="checkbox"/>
				\$	<input type="checkbox"/>
				\$	<input type="checkbox"/>

Total Meals: \$ _____ × 50% = \$ _____ deductible

Method 2: Per Diem Method (no receipts needed)

Destination per diem rate: \$ _____ per day

Date	Full Day or Travel Day	Rate	Amount
	<input type="checkbox"/> Full Day <input type="checkbox"/> Travel Day (75%)	\$	\$
	<input type="checkbox"/> Full Day <input type="checkbox"/> Travel Day (75%)	\$	\$
	<input type="checkbox"/> Full Day <input type="checkbox"/> Travel Day (75%)	\$	\$
	<input type="checkbox"/> Full Day <input type="checkbox"/> Travel Day (75%)	\$	\$

Meal Subtotal (Per Diem): \$ _____

Other Business Expenses

Date	Description	Business Purpose	Amount	Receipt ✓
	Conference registration		\$	<input type="checkbox"/>
	Baggage fees		\$	<input type="checkbox"/>

	Hotel internet		\$	<input type="checkbox"/>
	Business phone calls		\$	<input type="checkbox"/>
	Laundry (trips >1 week)		\$	<input type="checkbox"/>
	Parking/tolls		\$	<input type="checkbox"/>
	Tips (business related)		\$	<input type="checkbox"/>
			\$	<input type="checkbox"/>
			\$	<input type="checkbox"/>

Other Expenses Subtotal: \$ _____

Expense Summary

Category	Amount	Tax Deductible
Transportation	\$	\$ (100%)
Lodging	\$	\$ (100%)
Meals (Actual × 50%)	\$	\$ (50%)
Meals (Per Diem)	\$	\$ (100%)
Other Business Expenses	\$	\$ (100%)
TOTAL EXPENSES	\$	\$

Combined Business/Personal Travel Analysis

If this trip included personal days:

Primary Purpose Test

Total days: _____ **Business days:** _____ **Personal days:** _____

Business percentage: _____%

Primarily Business (>50% business days)

- Transportation 100% deductible

- Deduct lodging/meals only for business days

Primarily Personal ($\leq 50\%$ business days)

- Transportation NOT deductible

- No business expense deductions

Allocation Notes:

International Travel (if applicable)

Days outside US: _____ Business days outside US: _____

Business day percentage: _____%

75% or more business days → Transportation fully deductible

Less than 75% business days → Transportation not deductible

Supporting Documentation Checklist

All lodging receipts (regardless of amount)

All receipts \$75 or more

Transportation tickets/receipts

Meeting confirmations/invitations

Conference agendas/registration

Business cards from contacts met

Calendar entries showing business meetings

Photos of business activities (optional but helpful)

Email correspondence confirming business purposes

Approval & Certification

I certify that:

- All expenses listed were incurred for legitimate business purposes
- I have supporting receipts as indicated
- Personal expenses have been excluded
- The information provided is accurate and complete

Signature: _____ **Date:** _____

Printed Name: _____

Per Diem Quick Reference (2026 Rates)

High-Cost Localities (M&IE Rates)

City	M&IE Rate
New York, NY	\$79
San Francisco, CA	\$79
Los Angeles, CA	\$74
Washington, DC	\$69
Chicago, IL	\$69
Boston, MA	\$69
Seattle, WA	\$69

Travel Day Rules

- **Full day at destination:** 100% of per diem rate
- **Travel day (departure/arrival):** 75% of per diem rate
- **Last day rule:** If departing before noon, use 75% rate

Standard Rate

Most other U.S. locations: \$59/day for meals and incidentals

Full current rates available at: [gsa.gov/travel/plan-book/per-diem-rates](https://www.gsa.gov/travel/plan-book/per-diem-rates)

IRS Documentation Requirements Reminder

The Five Elements (Required for ALL expenses):

- **Amount** of each expense
- **Time and place** of travel/expense
- **Business purpose** of the expense
- **Business relationship** of persons entertained (if applicable)
- **Receipt or other evidence** supporting the expense

Record Retention

- Keep all travel expense reports and supporting receipts for **at least 3 years**
- IRS can audit up to 3 years after filing (6 years if income is understated by 25%+)
- Store digital copies in cloud storage as backup

For the complete guide, read: [Business Travel Expense Deductions](#)

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