

**CONSULTANT'S**

**ORGANIZING**

**YOUR**

**MARY KAY BUSINESS**

**with**  
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## **ORGANIZING YOUR BUSINESS**

### WHAT SUPPLIES DO I NEED?

1. Box/Filing Cabinet
2. Hanging Files
3. File Folders
4. Envelopes

### NOW WHAT?

1. Organize hanging files by category  
(see separate list)
2. Weekly Accomplishment Sheets  
- properly filled out with sales carried forward
3. When in doubt - - - keep it!!!  
(it is easier to throw something out when you find out you don't need it for tax purposes, rather than having to reconstruct it, or get copies.

**WHY PAY MORE TAXES! CLAIM EVERYTHING YOU CAN!**

## HANGING FILES BY CATEGORY

### HANGING FILES:

Car:

Home:

Sales:

Commission Income:

Purchases:

Inventory:

Other:

Office:

### FILE FOLDERS/ENVELOPES:

Mileage Records

Gas & Oil

Repairs & Maintenance

Car Lease

Car Washes

Insurance

Parking

Car Purchase

Short Term Rentals

Heat

Hydro

Insurance

Maintenance

Mortgage/Taxes/Rent

Water

Weekly Accomplishment Sheets

Monthly Commission Reports

Order Printouts

Sales Supplies

Inventory Printouts

Advertising/Promotion

Bad Debts

Delivery & Freight

Business Insurance

Bank Statements

Visa Statements

Mastercard Statements

Meals/Entertainment

Travel

Postage

Office Supplies

Telephone - Long Distance / Internet Fees

Conferences:

Seminar  
Career Conference

Meetings & Training Costs

Meetings  
Other Training

Equipment:

Equipment Purchases  
Equipment Information

Personal

Personal Product Purchases  
Income Tax Slips

Mary Kay Meetings  
Director

**CONSULTANT NAME** \_\_\_\_\_ **YEAR ENDING** \_\_\_\_\_

**CAR EXPENSES**

Odometer reading at beginning of year \_\_\_\_\_

Odometer reading at end of year \_\_\_\_\_

Total km. driven in taxation year to earn income \_\_\_\_\_

Total km. driven in taxation year \_\_\_\_\_

Total gas and oil expenses \_\_\_\_\_

Total repairs and maintenance \_\_\_\_\_

Total lease payments (if car is leased)(see MK letter) \_\_\_\_\_

Total car washes \_\_\_\_\_

Total insurance expense \_\_\_\_\_

Total license \_\_\_\_\_

Total short term rentals (if personal & MK use) \_\_\_\_\_

Total interest on money borrowed to purchase car \_\_\_\_\_

Capital Cost Allowance:

- when did you buy the car \_\_\_\_\_

- how much did it cost \_\_\_\_\_

Total parking (business only) \_\_\_\_\_

CONSULTANT NAME \_\_\_\_\_ YEAR ENDING \_\_\_\_\_

**OTHER INFORMATION**

Total Sales - without tax (Retail)(Before discounts) \_\_\_\_\_  
(See Weekly Accomplishment sheets)

Other MK Income - commissions, interest, etc. \_\_\_\_\_

Personal product consumed  
\_\_\_\_\_

Opening inventory (last year's closing inventory) (if needed) \_\_\_\_\_  
(At wholesale - don't count free product - without tax)

Section 1 Purchases - (from printouts from Mary Kay) \_\_\_\_\_  
- (along with any delivery charges)  
- (approx. y-t-d wholesale)  
- (calendar year not seminar year)

Closing inventory (what's left on your shelf at year end - at cost) \_\_\_\_\_  
(At wholesale - don't count free product - without tax)

Discounts (from weekly accomplishment sheets) \_\_\_\_\_

Advertising and promotion ("Preferred Customer",  
hostess gifts, newspaper advertising, flyers, other gifts, etc.) \_\_\_\_\_  
(Also includes coffee, snacks for open houses, etc)

Bad Debts \_\_\_\_\_

Delivery, freight (not from M.K.) \_\_\_\_\_  
(UPS, shipping things to customers, etc)

Insurance (inventory, liability) \_\_\_\_\_  
(Separate from home - extra for business)

Interest, bank charges \_\_\_\_\_  
(Credit card interest, loan interest, line of credit interest,  
Moneris, etc.)

Meals and entertainment - Total \_\_\_\_\_ 50% \_\_\_\_\_  
(All meals for business only - should include meals from  
Seminar, Leadership, Career Conference, retreats, travel, etc)

Office expenses (postage, stationery, etc.) \_\_\_\_\_  
(Postage, office supplies, office assistance, photocopying, etc)

Sales supplies - Section 2 (including tax) \_\_\_\_\_  
(Also includes other supplies – Q-tips, cotton balls,  
placemats, other class supplies)

Accounting, collection, legal costs \_\_\_\_\_  
(Cost of getting tax return prepared, small claims, etc)

Travel \_\_\_\_\_  
(Taxis, planes, trains, accommodations, etc.)  
(Any meals should be claimed under meals & entertainment)

Long distance telephone calls, cell phone charges \_\_\_\_\_  
(Do not claim line charges for personal phones)

Internet Fees \_\_\_\_\_

Meetings & training costs \_\_\_\_\_  
(Workshops, retreats, Red Jacket University,  
Weekly meeting charges)

Depreciation (office furniture, computer equipment,  
TV's, VCR's, etc. over \$200) \_\_\_\_\_  
(Provide list of items purchased along with individual cost)  
(Keep a running list of all these items ever purchased by your  
business – as it is needed when any of these items are disposed of)

Convention expenses (not including meals) \_\_\_\_\_  
(Registrations, hotels, flights, taxis, all expenses except  
meals & car expenses)

Computer & other equipment rental \_\_\_\_\_

**CONSULTANT NAME** \_\_\_\_\_ **YEAR ENDING** \_\_\_\_\_

**BUSINESS USE OF HOME**

Total square footage of your home \_\_\_\_\_

Square footage used for business \_\_\_\_\_  
(Office area – does not include personal living space)

Total heat \_\_\_\_\_

Total hydro – electricity \_\_\_\_\_

Total insurance \_\_\_\_\_

Total maintenance \_\_\_\_\_  
(Could include cleaning person, also includes work done to office area)

Total mortgage interest \_\_\_\_\_

Total property taxes \_\_\_\_\_

Or total rent \_\_\_\_\_

Water \_\_\_\_\_

