

**CONSULTANTS**

**ORGANIZING**

**YOUR**

**MARY KAY BUSINESS**

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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:

Conferences:

Meetings & Training Costs:

### FILE FOLDERS/ENVELOPES:

Mileage Records  
Gas & Oil  
Repairs & Maintenance  
Car Lease  
Car Washes  
Insurance  
Parking  
Car Purchases  
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

Seminar  
Career Conference

Meetings  
Other Training

Equipment:

Equipment Purchases  
Equipment Information

Personal:

Personal Product Purchases  
Income Tax Slips

Mary Kay Meetings  
Director

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

**CAR EXPENSES**

Car Make/ Model/ Year \_\_\_\_\_

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) \_\_\_\_\_

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

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

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

Total short term rentals \_\_\_\_\_

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) \_\_\_\_\_

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 products – 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 Customers”, hostess gifts,  
newspaper advertising, flyers, other gifts, etc. ) \_\_\_\_\_  
(Also include 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, Propay, 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, office supplies, office assistance, photocopying, etc.)

Sales supplies – Section 2 (including tax)

(Also include other supplies –Q-tips, cotton balls, placemats, other class supplies)

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Accounting, collection, legal costs

(Cost of getting tax return prepared, small claims, etc.)

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Travel

(Taxis, planes, trains, accommodations, etc.)

(Any meals should be claimed under meals & entertainment)

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Long distance telephone calls, cell phone charges

(Do not claim line charges for personal phones)

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Internet Fees

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Meetings & training costs

(Workshops, retreats, Red Jacket University, Weekly meeting charges)

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Depreciation (office furniture, computer equipment, TV's, etc. over \$500)

(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)

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Convention expenses (not including meals & car expenses)

(Registrations, hotels, flights, taxis, etc.)

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Computer & other equipment rental

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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 \_\_\_\_\_