

DIRECTOR'S

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:

Other Income:

Inventory

Purchases:

Other:

Office:

Professional Fees:

FILE FOLDERS/ENVELOPES:

Mileage Records
Gas & Oil
Repairs & Maintenance
Vehicle Lease
Insurance
Car Washes
Parking
Car Purchases
Short Term Rentals

Heat
Hydro
Insurance
Maintenance
Mortgage/Taxes/Rent

Weekly Accomplishment Sheets

Monthly Commission Reports
Yearly Mary Kay Letter

Other Income –Interest, etc.

Inventory Counts

Order Printouts
Sales Supplies

Advertising/Promotion
Bad Debts
Delivery & Freight
Insurance
Moneris
Line of Credit/Loan Stmts
Visa Stmts
Mastercard Stmts
Bank Stmts
Meals & Entertainment

Postage
Office Supplies
Office assistance
Photocopying

Accounting
Collection

Legal

Travel:

Taxis, Planes, Trains
Short Term Car Rentals

Telephone/Fax:

Long distance –home phone
Direct MK Line

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) (See MK Letter) _____

Total car washes _____

Total insurance expense (Personal or Unit Analysis Printout) _____

Total license _____

Total short term rentals (If for MK & personal 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) _____

NAME _____ YEAR ENDING _____

OTHER INFORMATION

Total Sales –without tax – before discounts
(Retail –from Weekly Accomplishment Sheet) _____

Other MK Income –commissions, interest, etc.
(Including bonuses, bank interest, MK letter)
(Include slips from U.S. Income) _____

Personal product consumed (not demos) _____

Meeting room income _____

Opening inventory (last year's closing inventory) (if needed)
(Wholesale – don't count free products – without tax) _____

Section 1 Purchases – (from printouts from Mary Kay)
- (along with any delivery charges)
- (approx. year to date wholesale)
- (calendar year not seminar year) _____

Closing inventory (what's left on your shelf at year end – at cost)
(Wholesale – don't count free product – without tax) _____

Discounts (from weekly accomplishment sheets) _____

Advertising and promotion (Hostess gifts, newspaper advertising, flyers,
Yellow Pages, Unit promotions/prizes, wrapping, business cards, 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) _____

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) _____

Telephone/Fax (Long distance on home phone, direct MK line, business services on home phone, cell phone charges, fax charges, etc.) _____

Internet Fees _____

Director's Suit _____

Unit meeting room rental _____

Meetings & training costs (for you not others)
(Career Conference, retreats, Red Jacket University, other workshops, Registration for above and accommodations for above) _____

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) _____

Convention expenses (not including meals & car expenses)
(Registrations, hotels, flights, taxis, etc.) _____

Computer & other equipment rental
(Computers, photocopiers, postage machines, etc.) _____

NAME _____ YEAR ENDING _____

BUSINESS USE OF HOME

Total square footage of your home _____

Square footage used for business _____
- Exclusively M.K. use

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 _____