

ORGANIZING

YOUR

BUSINESS

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ORGANIZING YOUR BUSINESS

WHAT SUPPLIES DO I NEED?

1. Box
2. Hanging Files
3. File Folders
4. Envelopes

NOW WHAT?

1. Organize hanging files by category
(see separate list)
2. 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:

Other Income:

Purchases:

Other:

Office:

Equipment:

FILE FOLDERS/ENVELOPES:

Mileage Records

Gas & Oil

Repairs & Maintenance

Insurance

Car Washes

Parking

Car Purchases

Heat

Hydro

Insurance

Maintenance

Mortgage/Taxes/Rent

Invoices

Other

Invoices

Accounting/Collection/Legal

Advertising/Promotion

Conferences

Meeting/Training Costs

Delivery/Freight

Computer/Other Equipment Rental

Insurance

Bank Statements

Visa

Mastercard

Meals/Entertainment

Travel

Postage

Office Supplies

Telephone –Long Distance

Equipment Purchases

Equipment Information

NAME _____ YEAR ENDING _____

GENERAL INFORMATION

Total Sales –without tax _____

Other Income –commissions, interest, etc. _____

Opening inventory (last year’s closing inventory, if needed) _____

Purchases –along with any delivery charges _____

Closing inventory (what’s left on your shelf at year end –at cost) _____

Advertising and promotion _____

Bad Debts _____

Business Fees (registration, etc.) _____

Delivery, freight (not deducted under purchases) _____

Insurance (inventory, liability) _____

Interest, bank charges _____

Meals and entertainment –Total _____ 50% _____

Office expenses (postage, stationary, etc.) _____

Accounting, collection, legal costs _____

Supplies _____

Travel expenses (except automobile) _____

Long distance telephone calls/ business cell phone/ lines _____

Meeting & training costs _____

Depreciation (office furniture, computer equipment, TV’s, etc.) _____

Software _____

Convention expenses (not including meals) _____

Computer & other equipment rental _____

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 _____

BUSINESS USE OF HOME

Total square footage of your home _____

Square footage used for business _____

Total heat _____

Total hydro –electricity _____

Total insurance _____

Total repairs and maintenance _____

Total mortgage interest _____

Total property taxes _____

Or total rent _____

Other _____