

**DIRECTOR'S**

**ORGANIZING**

**YOUR**

**MARY KAY BUSINESS**

**with**  
**MARION WRIGHT**

**Calculated Success Inc.**  
**101-450 Speedvale Ave. W.**  
**Guelph, Ontario**  
**N1H 7Y6**  
Phone: (519)763-5557  
Fax: (519)763-0291

## **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:

Commissions:

Other Income:

Inventory:

Purchases:

Other:

### FILE FOLDERS/ENVELOPES:

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

Heat  
Hydro  
Insurance  
Maintenance  
Mortgage/Taxes/Rent

Weekly Accomplishment Sheets

Monthly Commission Stmts  
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

Office:

Postage  
Office supplies  
Office assistance  
Photocopying

Professional Fees:

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

**DIRECTOR 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 (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) \_\_\_\_\_

**DIRECTOR 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 products consumed (not demos) \_\_\_\_\_

Meeting room income  
\_\_\_\_\_

Opening inventory (last year's closing inventory) (if needed)  
(Wholesale – don't count free product – 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  
- Unit prizes  
- Wrapping, baskets, etc  
- Refreshments for Open Houses, etc  
- Business cards

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

Delivery, freight (not Mary Kay) \_\_\_\_\_  
- UPS  
- Shipping products to customers

Insurance (inventory, liability) \_\_\_\_\_  
(Separate from home – riders for business)

Interest, bank charges \_\_\_\_\_

- Credit Card interest
- Moneris
- Loan interest
- Line of credit interest
- Bank charges

Meals and entertainment - Total \_\_\_\_\_ 50% \_\_\_\_\_

- For business purposes only
- Meals from seminar, conferences, etc
- Meals from travel
- Meals from Leadership

Office expenses (postage, stationery, etc.) \_\_\_\_\_

- Postage
- Office supplies
- Office assistance
- Photocopying

Sales supplies - Section 2 (including tax) \_\_\_\_\_

- Also other class supplies, etc
- e.g. cotton balls, placemats, etc

Accounting, collection, legal costs \_\_\_\_\_

- Cost of tax return preparation
- Small claims
- Legal fees

Travel \_\_\_\_\_

- Taxis
- Planes
- Trains
- Short term car rentals (MK only)

Telephone/Fax \_\_\_\_\_

- Long distance on home phone
- Direct MK line
- Business services on home phone

- Cell phone charges
- Fax charges

Internet Fees

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Director's Suit

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Unit meeting room rental

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Convention expenses (not including meals)

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- Leadership & Seminar
- registration
- accommodations
- flights, taxis
- (all expenses except meals)
- meals under meals
- car expenses under car

Meetings & training costs (for you not others)

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- Career Conference
- Retreats
- Red Jacket University
- Other Workshops
- Registrations for above
- Accommodations for above
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Depreciation (office furniture, computer equipment,  
TV's, VCR's, etc. over \$200)

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(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.)

Computer & other equipment rental

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- computers
- photocopiers
- postage machines

**DIRECTOR 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 \_\_\_\_\_  
- e.g. cleaning person

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

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

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

Water \_\_\_\_\_

