



**Financial Savvy**

## INSIDE WILL INCLUDE:

1. 12- month tabs (Jan.—Dec)
2. Clear page protectors for each month
  - ⇒ Print tax sheet for each month
    - Drop in **ALL** receipts for the month, total all receipts and add to tax sheet
  - ⇒ Customer Bank copy of receipt
  - ⇒ MK bank statement
  - ⇒ Copy of monthly commission check
  - ⇒ MK Corp InTouch receipts-circle UPS shipping
  - ⇒ Weekly accomplishments
  - ⇒ Mileage log

## ON YOUR DESK:

1. CONTAINER: bin, box, basket, etc.
  - ⇒ Mini card files w/tabs labeled as:
    - ⇒ To Be Entered
    - ⇒ 1-31, 2 days, 2 weeks
    - ⇒ Waiting For Product
    - ⇒ Payment Plans/Need Payment
2. CUSTOMER BINDER A-Z
  - ⇒ A-Z Tabs
  - ⇒ Clear page protectors for each customer

## PROFILE CARD INSTRUCTIONS

- ⇒ Go to MK InTouch and enter your customer's information.
- ⇒ File the customer profile card in the Customer Binder in their own page protector under the first letter of their last name.

## RECEIPT INSTRUCTIONS

- ⇒ Go to MK InTouch and enter your customer's order and complete your weekly accomplishment sheet.
- ⇒ Put a pink highlighted check on the receipt when entered.
- ⇒ File receipt in container on your desk in the corresponding tab for 2 days later.
- ⇒ Every day check this container and follow-up with the customer(s) who are filed under that date. (Example: April 24 would be tab 24)
- ⇒ Once you follow-up with a customer after 2 days then mark the receipt with a star and move it to the tab that corresponds with 2 weeks later.
- ⇒ Lastly, once you properly followed-up on day 2 and week 2— file the top copy of the receipt behind the profile card in your Customer Binder.

## WEEKLY ACCOMPLISHMENT INSTRUCTIONS

- ⇒ Go to MK InTouch
  - Business Tools
  - Weekly Accomplishments
  - Enter Weekly Accomplishments
- ⇒ Correctly enter your information & submit.



INCOME AND EXPENSE SUMMARY FOR  
 MARY KAY CONSULTANTS  
 Prepared by Dennis Mason, CPA PC  
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Month/Year: \_\_\_\_\_

INCOME	INVENTORY
Sales (Total of pink slips without sales tax) _____	Sec 1 purchases _____
Commissions _____	Personal use _____
Prizes and awards _____	Ending inventory _____
<b>EXPENSES</b>	
<b>Automobile</b>	<b>Gas</b> _____
Total miles driven _____	Insurance _____
MK miles driven _____	Repairs, car wash _____
	Cost of lease _____
<b>Promotion</b>	<b>Seminars</b>
Advertising _____	Workshops _____
PCP _____	Meeting expenses _____
Cards, flowers, etc _____	
<b>Office expenses</b>	<b>Telephone</b>
Supplies _____	Land line _____
Small equipment _____	Cellular phone _____
	Internet fees _____
<b>Supplies</b>	<b>Postage</b>
Sec 2 purchases _____	Postage and UPS _____
Cotton balls, wash cloths _____	MK freight charges _____
packing supplies _____	
<b>Travel</b>	<b>Interest</b>
Airfare _____	Bank loan _____
Hotel _____	Credit cards _____
Taxi, shuttle, tips _____	
<b>Meals</b>	<b>Wages</b>
While traveling _____	Secretary _____
Entertaining, recruiting _____	Minor children _____
	Directors suit or _____
	or red jacket _____
<b>Room\booth rent</b> _____	Cleaning _____
	Pro Pay fees _____
<b>Office at home</b>	
Sq feet of office _____	Rent paid _____
Sq feet of home _____	Utilities _____
Original cost of home _____	Homeowners insurance _____

