

Name \_\_\_\_\_ Your Local (Adopted) Director \_\_\_\_\_ Tax Year \_\_\_\_\_  
Address \_\_\_\_\_ City, State, & Zip Code \_\_\_\_\_ Cell Ph. # \_\_\_\_\_

**\* DO NOT FORGET TO INCLUDE THE SALES INCOME & EXPENSES VIA ONLINE CUSTOMER DELIVERY SERVICE SALES.**

Date You Started Your Business \_\_\_\_\_; Claimed last yr.? \_\_\_\_\_

**RECEIPTS (total \$s received after discounts)** (@ **RETAIL**)

Net Sales + Tax Collected (sales tickets + **online**) \$ \_\_\_\_\_

Dovetail Received & Sales to Consultants + Tax \$ \_\_\_\_\_

Returns & Uncoll. Sales Included in "Net Sales" \$ \_\_\_\_\_

Comm./Prizes Received (**Income Advisory Stmt.**) \$ \_\_\_\_\_

**Train. Ctr./Mtg. Room/Hotel Income** (Dir.s only) \$ \_\_\_\_\_

**\* Pers. use, gifts, & inventory valued @ wholesale = 1/2 retail**

**COST OF GOODS SOLD (Demos are N/A)** (@ **WHOLESALE**)

Beginning Inventory on 1/1/\_\_\_\_ (if 1st yr., = "0") \$ \_\_\_\_\_

Section 1 Purchased (invoices/**online**/consultants) \$ \_\_\_\_\_

Personal Use of Section 1 Cosmetics (**1/2 Retail**) \$ \_\_\_\_\_

Sect. 1 Cosmetics Given Away (**online**; **1/2 Retail**) \$ \_\_\_\_\_

Sect. 2 Purchased (Beauty Case/invoices/**online**) \$ \_\_\_\_\_

Sect. 1 & 2 Sales Taxes You **Pd.** (invoices/**online**) \$ \_\_\_\_\_

End. Inventory (Sect. 1 **only**) on 12/31/\_\_\_\_ (**1/2 R.**) \$ \_\_\_\_\_

**\* The space for office in home must be used exclusively for bus.**

**OFFICE IN HOME DATA (if 2 homes used, separate by a ";")**

**Office & Storage:** Sq. Ft. | & # of **entire** rooms used \_\_\_\_\_

**Entire Home:** Sq. Ft. (excl. garage) | & # of rooms \_\_\_\_\_

Date Apartment/House Rented or Purchased \_\_\_\_\_

Purch. Price + **Closing + Improve. Prior to Bus.** \$ \_\_\_\_\_

Est. Value of Land **Only** (county tax appraisal) \$ \_\_\_\_\_

**HOME OFFICE EXPENSES** (mos. in bus.) (**for 2, sep. by a ";"**)

Mortgage Int. (**only**) (Form 1098/coupon book) \$ \_\_\_\_\_

Real Estate Taxes (Form 1098/coup. book/checks) \$ \_\_\_\_\_

Homeowner/Hazard/Renter's Insur. (1098/checks) \$ \_\_\_\_\_

**Rent (NOT mortgage)** Payments (mos. in bus.) \$ \_\_\_\_\_

Repairs (**put improve. on Depr. W/s only**), Lawn \$ \_\_\_\_\_

Utilities: Gas \$ \_\_\_\_\_ Water \$ \_\_\_\_\_ Electric \$ \_\_\_\_\_

Security, Pest, Housekeeper, & Association Fees \$ \_\_\_\_\_

**\* IRS REQUIRES THAT YOU KEEP A MILEAGE LOG \***

**\* = Circle "Leased" if car was leased, and... CAR DATA FOR EACH CAR USED IN BUS. ...draw an arrow to which car was leased. \***

Year, Make and Model \_\_\_\_\_

Date **Purchased/Leased\*** \_\_\_\_\_

Purchase/Lease Price Including Tax \$ \_\_\_\_\_; \$ \_\_\_\_\_

**OPERATING EXPENSES (\* = allocate per business usage)**

Advertising & Preferred Cust. Program name fees \$ \_\_\_\_\_

Bank & Credit Card Processing (ProPay) Fees \$ \_\_\_\_\_

Contract Labor (for work done by your asst./kids) \$ \_\_\_\_\_

Product Liability Insurance (**bought from co.**) \$ \_\_\_\_\_

Credit Card/Loan **Int. only (business use only)\*** \$ \_\_\_\_\_

Tax Prep. \$ \_\_\_\_\_; Prof. (virtual asst./newsletter) Svcs. \$ \_\_\_\_\_

Off. Supp. (**furn./equip. on Depr. W/sheet only**) \$ \_\_\_\_\_

**Rent (mtg. rooms/dues/raffles/booths/storage)** \$ \_\_\_\_\_

Equipment: **Rental** \$ \_\_\_\_\_; **Repairs** \$ \_\_\_\_\_

Facial Supplies (Q-Tips, cotton balls, washcloths) \$ \_\_\_\_\_

Travel: **Transportation** \$ \_\_\_\_\_; **Lodging** \$ \_\_\_\_\_

Bus. Meals (bt. for others) \$ \_\_\_\_\_; Mtg. Refresh. \$ \_\_\_\_\_

Out of Town Bus. Meals \$ \_\_\_\_\_; # of nights out of town \_\_\_\_\_

**2<sup>nd</sup>, Separate (bus.)** Phone Line + Bus. Long Dist. \$ \_\_\_\_\_

Cell Phone, Beeper, Call Notes (**bus. use only**)\* \$ \_\_\_\_\_

Seminars \$ \_\_\_\_\_; **Top Dir./NSD Trip** \$ \_\_\_\_\_ **bus./total days** /

Dir. Suit/Red Jacket/Seminar Dress/Smock/Tux. \$ \_\_\_\_\_

Laundry, Drycleaning, & Alter. (**above items only**) \$ \_\_\_\_\_

Basket Materials (shrink wrap, moss, bows, etc.) \$ \_\_\_\_\_

Postage/Freight (invoices/**online**/out of town cust.) \$ \_\_\_\_\_

Hostess Gifts (**other than Sect. 1 & 2; \$25 max.**) \$ \_\_\_\_\_

Film + Devel. Costs (before & after pictures) \$ \_\_\_\_\_

Dues/Publications (bus./glamour mag., CDs/DVDs) \$ \_\_\_\_\_

Consultant Prizes, Awards, & Promotions Given \$ \_\_\_\_\_

Other (rent car\*, Dir. supplies, internet\*) \$ \_\_\_\_\_

**TOTAL (full year) CAR EXPENSES** **Car #1** **Car #2**

Gas, Repairs, Parts, Maint., & Car Wash \$ \_\_\_\_\_; \$ \_\_\_\_\_

Insurance, Tags, Inspec., OnStar, & AAA \$ \_\_\_\_\_; \$ \_\_\_\_\_

**Car Loan Int. (only)/Lease\*** Payments \$ \_\_\_\_\_; \$ \_\_\_\_\_

M-K Parking/Tolls \$ \_\_\_\_\_; Inclusion Amt. (I'll do) \$ \_\_\_\_\_; \$ \_\_\_\_\_

**\*\* I ATTEST TO THESE MILEAGE FIGURES (initial) \*\*** \_\_\_\_\_

Miles Driven for **Cosmetics Purposes Only** \_\_\_\_\_;

Total Miles the Vehicle Was Driven (**full yr.**) \_\_\_\_\_;

R. T. Job Commute \_\_\_\_\_; Is there more than 1 car in your home? \_\_\_\_\_

(Revised 1/3/19)

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Personal Income Tax Preparation  
Personal Tax Estimating  
Personal Tax Planning

**DO NOT add the purchase price of these items in with "Office Supplies" or home office "Repairs".**

**FOR REPEAT CLIENTS, REPORT ONLY THE CHANGES TO WHAT WE HAVE ON FILE FROM LAST YEAR.**

**\*\* Complete the first four columns, even if purchased prior to going into business or ministry. Include home improvements (if you have a home office), equipment upgrades, software, desk, chair, lamp, file cabinet, bookshelf, table, computer, iPad, iPod, calculator, scanner, copier, fax machine, TV, CD/DVD/Blu-Ray player, stereo, telephones, cell phones, answering machine, camera, PDA, power tools/equipment, appliances, and other capital assets.**

[illegible]**TRAINING CENTER EXPENSES** (report Total Rent Income collected on front side)

Repairs/Maint. (report improve. above) \$

Insurance \$ : Telephone \$

Taxes and/or Fees (describe)	\$
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Other (describe: ex., internet/cable) \$