CLIENT START-UP CHECKLIST
EMPLOYER INFORMATION SHEET

General Information

Business Name   _____   Contact Name _____

Business Address   _____   Phone   _____

City, State, Zip   _____   Fax   _____

                                                                Email   _____

Filing Name (if different)   _____

Filing Address (if different) _____

City, State, Zip   _____

Company Type   ❍ S-Corp   ❍ C-Corp   ❍ LLC   ❍ LLP   ❍ Partnership
                      ❍ Sole Proprietor   ❍ 501c3   ❍ Other _____

Payroll Information

No. of W-2 employees _____
No. of 1099 contractors to be paid through payroll _____

First Date To Run Payroll   MM____ / DD____ / YY ____

Federal EIN _____ ❑ Applied For

State Employer Account No. _____ ❑ Applied For

State Unemployment No. _____ ❑ Applied For

State Unemployment Insurance Rate _____% (if known)

Other state tax rates, if applicable:

_____

_____

Federal Deposit Schedule

❑ Monthly
❑ Semi-Weekly
❑ Other_____

State Deposit Schedule
Only applicable to states with income tax

❑ Same as federal
❑ Other_____

Attach any historical payroll information from this calendar year for all active <u>and terminated</u> employees

❑ We have not run any payroll yet this year

If you will begin using our service at the start of the 2nd, 3rd or 4th calendar quarter (April 1, July 1, or October 1), please include:

❑ Year-to-date wages, taxes, and deductions for each employee

❑ Dates and amounts of all payroll tax payments made to date for current year tax liabilities

If you will begin using our service in the middle of a calendar quarter, please include:

❑ Year-to-date wages, taxes, and deductions for each employee as of the most recent payroll

❑ Year-to-date wages, taxes, and deductions for each employee as of the end of the most recent calendar quarter *(not applicable if you're starting in the middle of the first calendar quarter)*

❑ Payroll register or other summary for <u>each</u> payroll date in the current quarter, including total amounts for each wage item, tax, and voluntary deduction on that date.

❑ Dates and amounts of all payroll tax payments made to date for current year tax liabilities

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Notes: