

New Client Check List

- IRS Legal doc stating business name and Address: _____
- Federal ID Number (EIN) _____
- State Unemployment ID Number and Rate (Any preprinted state correspondence) _____
- State/Local Tax rates and numbers if applicable (include all states if you operate in multiple states) _____
- Federal Deposit Frequency: Semi-Weekly: _____ Monthly: _____
- Voided check from account on which payroll and/or taxes will be drawn on _____
- List of Divisions and Department Titles and their corresponding numbers : _____
- Delivery/Shipping information (if different than legal address) _____
- Copy of Previous Completed Quarter's (941's & State/Local Forms) _____
- If applicable: Year to date and Quarter to date gross to net earnings by employee including all tax deposits made to the IRS, State & Local Agencies. _____