	wnat information needs to go into a New Client Packet	
All of	the sales packet paperwork filled out	
0	Company Legal Name	
0	DBA if they have one	
0	Delivery address**where the payroll is delivered.	
0	All contacts (there should always be at least two) with email addresses	
0	Tax Info	
0	Business Classification	
0	Payroll Frequency	
0	Calendarplease use dates and not the days of the week.	
For Ta		
0	The latest tax return	
0	An IRS letter that has the company name and federal ID number	
0	State document that has the tax frequency on it (new clients will not have the tax freq most likely but ask)	
0	Form 8655 filled out correctly	
0	State power of attorney forms	
0	If a client is non profit we will need a copy of their 501(c) (3)	
Bank	Account:	
0	A copy of a voided check always	
0	If the name or the address ion the check is different we will need to know which to use	
0	Imperative on an older bank account we need a starting check number (don't just make on up)	
Dedu	ctions:	
0	These are usually taken off of the payroll registers if they have them	
0	A New Company may be in the process of setting benefits up please notate them as pre or post tax	
Specia	alties:	
0	General Ledger we will need a chart of accounts (there is a questionnaire for the client to fill out)	
0	Accruals we need to have the company policy (there is a questionnaire for the client to fill out)	
0	Time clock interface we will need a current file of what they import	
O Addi+	Premium only plan. If they have an older document that would be great onal Forms:	
Additi		
0	HR Answer link filled out	
0	HR Answer link filled out Sales accounting form completed	
0	Sales accounting form completed	
000	Sales accounting form completed Signature Form	
0	Sales accounting form completed Signature Form Client Responsibility Form	
0	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement	
0000	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal	
O O Emplo	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement	
O O Emplo	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Oyee data:	
O O Emplo	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Expected data: Legal name Address	
O O O Emplo	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal yee data: Legal name	
O O O Emplo	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Eyee data: Legal name Address Social security number Hire date	
O O O O O	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Eyee data: Legal name Address Social security number	
0 0 0 0 mplo	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Injury et data: Legal name Address Social security number Hire date Birth date (especially if they have 401K)	
000mple	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Eyee data: Legal name Address Social security number Hire date Birth date (especially if they have 401K) Pay rate Tax exemptions	
000mple	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Eyee data: Legal name Address Social security number Hire date Birth date (especially if they have 401K) Pay rate Tax exemptions Email address if it is a paperless payroll	
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0000mplc	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Expect data: Legal name Address Social security number Hire date Birth date (especially if they have 401K) Pay rate Tax exemptions Email address if it is a paperless payroll Departments if they have a structure set up Direct deposit form with a copy of the check or letter from the bank	
0000mple	Sales accounting form completed Signature Form Client Responsibility Form Payroll Services Agreement Billing Proposal Egal name Address Social security number Hire date Birth date (especially if they have 401K) Pay rate Tax exemptions Email address if it is a paperless payroll Departments if they have a structure set up Direct deposit form with a copy of the check or letter from the bank List of deductions if they have any with the per payroll amount	
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