



Payroll Intake Form

Name of Company and Type

Date of last Pay Period

Pay Period Covered

Documents needed from Employer:

EIN

State Withholding Registration #s

NY

CT

NJ

State Unemployment Insurance #s

NY

CT

NJ

Company Required Docs

Quarterly filings (Federal and State)

Q1 2018

Q2 N/A

Q3 N/A

Q4 N/A

Voided check from where funds will be withdrawn

Payroll register through last payroll period

Signed payroll forms (to be sent once all information provided and complete)

Items needed for each employee (each):

W4 form

State W4 form

DOB

Date Hired

Tel #

Email

Voided check (if direct deposit)