

EMPLOYER INFORMATION SHEET

General Information

Business Name: _____ Business Address: _____ City, State, Zip: _____ Filing Name (if different): _____ Filing Address (if different): _____ City, State, Zip: _____	Contact Name: _____ Phone: _____ Fax: _____ Email: _____
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Company Type:
 S-Corp
 C-Corp
 LLC
 LLP
 Partnership
 Sole Proprietor
 Non-Profit
 Other _____

Direct Deposit Information

Name of Employer Bank/Credit Union _____
 Routing Number: _____ Account Number: _____



Principal's Name: _____ Social Security Number: _____
 Principal's Date of Birth: _____ Drivers License Number: _____

PLEASE NOTE

Federal law requires that I collect and verify the above information about the principal to help prevent money laundering and the funding of terrorist activity. The principal is the person who is the main contact for the bank account from which electronic payments (including direct deposit) are made. This information is stored in your electronic client file, and will never be shared with any third party unless authorized and required by law.

Payroll Information

Total # of W-2 employees _____ # Salaried _____ # Hourly _____ Total # of 1099 contractors to be paid through payroll _____ Date of 1 st Payroll Run MM____/ DD____/ YYYY____ Federal EIN _____ <input type="checkbox"/> Applied For State Employer Account # _____ <input type="checkbox"/> Applied For State Unemployment # _____ <input type="checkbox"/> Applied For State Unemployment Insurance Rate _____% (if known) Other state tax rates, if applicable: _____ _____	<p>Federal Tax Deposit Schedule</p> <input type="checkbox"/> Monthly <input type="checkbox"/> Semi-Monthly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Other _____ <p>State Tax Deposit Schedule <i>(Only applies in states with income tax)</i></p> <input type="checkbox"/> Same as federal <input type="checkbox"/> Other _____
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Payroll History

Attach any historical payroll information from this calendar year for all active **and terminated** employees

- Have not run any payroll yet this year

Beginning of Calendar Quarter Start. If you will begin using my service at the start of the 2nd, 3rd or 4th calendar quarter (April 1, July 1, or October 1), please include the following items.

- 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

Middle of Calendar Quarter Start. If you will begin using my service in the middle of a calendar quarter, please include the following items.

- 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 are starting in the middle of the first calendar quarter*)
- Payroll register or other summary for each 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

Notes