

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: _____

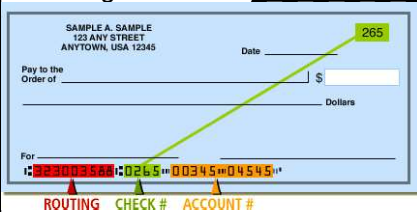
Email: _____

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 1st Payroll Run MM____ / DD____ / YYYY____

Federal EIN ☐ Applied For

State Employer Account # ☐ Applied For

State Unemployment # ☐ Applied For

State Unemployment Insurance Rate _____ % (if known)

Other state tax rates, if applicable:

Pay Frequency/Federal Tax Deposits

- ☐ Monthly
- ☐ Semi-Monthly
- ☐ Bi-Weekly
- ☐ Other

State Tax Deposits

(Only applies in states with income tax)

- ☐ Same as federal
- ☐ Other

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