



New Client Onboarding Questionnaire

(For new client informational purposes only, not for fill-in)

1. Do you have current payroll?

_____ **NO**

-We will take on the responsibilities to complete a PA-100 for your business and a 2553 to acquire an FEIN(if you don't already have one) and payroll withholding numbers.

_____ **YES** If YES, we will need the following from you:

- IRS Proof of FEIN and Legal Business Name
- State Tax ID Numbers and SUI Rate
- Prior Wage History for current tax year. I.E. YTD Payroll summary for all quarters that have been closed and a summary of each check date that has been completed in the current quarter. (We can assist in obtaining this information)
- Company Voided Check (no starter checks are accepted)
- Business Structure documentation (i.e. Corporation/S-Corp, LLC, Sole Proprietor, General Partnership)

2. Payroll Frequency: (circle one)

Weekly Bi-weekly Semi-Monthly Monthly



3. Number of employees? _____

4. How do you prefer paychecks to be delivered? (circle one)

Direct Deposit, Paystubs (you handwrite checks),
Paper Check printed by us and mailed to YOU! (fees may apply for mailed paper checks)

5. Do you have any of the following: (circle one)

Wage Garnishments

Simple IRA Deductions

Child Support deductions

Tips

Bonuses

Advanced Pay Deductions

Anything additional that you would like to be withheld from a check

6. Do you need end of tax year work for your business?

_____ YES

_____ NO



7. Do you need bookkeeping services?

YES

NO