



Simple Accounting

NEW CLIENT SET-UP CHECK LIST Please be sure to include all of the following items in your set-up packet. Thanks!

- Proof of Federal ID# (TAX deposit coupon/pre-printed 941) or SS-4
- Proof of State ID # (TAX deposit coupon/pre-printed UT-941E)
- Proof of State Unemployment ID#
- Voided check
- Employee information for all active and terminated employees (Please see the “New Employee Forms” for all necessary information)
- TAX deposits for the current quarter (on per period reports)
- TAX deposit frequency (semi-weekly / monthly)
- TAX deposit requirement letter from IRS
- Unemployment TAX deposits for the previous quarters in the current year
- Year to date totals for all employees and company total
- Quarter to date for all employees and company total
- Month to date for all employees and company total
- Copy of all payrolls in the current quarter
- Quarterly TAX returns for both the Federal and State (previous QTD if TAX returns have not been prepared yet)
- Vacation / Sick Policy
- Health Insurance Information
- Garnishment Information / Child Support documents