Simple Accounting

NEW CLIENT SET-UP FORM This New Client Set-Up form and all other forms included in this packet must be completed, signed and dated by a registered owner or officer in order to prevent any delays.

COMPANY INFORMATION

Who referred you?: _____ Current Payroll Method: ☐ In-house ☐ Outsource: _____

Common Name/dba: _____ Legal Name: _____

# of Employees: _____ ☐ Sole Proprietorship ☐ Limited Liability Partnership ☐ Limited Liability Corp. ☐ Incorporated ☐ Non-Profit

Company Address: _____ City: _____ State: _____ Zip: _____

AUTHORIZED CONTACTS

For your protection, please designate specific people within your organization who will act as our main point of contact. Our Payroll Specialists are instructed not to talk to anyone in your company other than these pre-approved contacts. We will refer all employee requests to your designated employer contact(s).

Print Name: _____

Job Title: _____

Phone: ( ) _____

Email: _____

☐ *e-Reports* ☐ *e-Billing*

Print Name: _____

Job Title: _____

Phone: ( ) _____

Email: _____

☐ *e-Reports* ☐ *e-Billing*

Please email hours to simpleacctg@gmail.com (for direct deposit payroll SIMPLE ACCOUNTING needs the hours 3 business days before pay date)

PAYROLL TAX

Federal EIN# ☐☐ - ☐☐☐☐☐☐☐ *EFTPS PIN #* _____

State Withholding # ☐☐☐☐☐☐☐☐ - ☐☐☐ - ☐☐☐

State Withholding PIN # _____

State Unemployment # ☐☐ - ☐☐☐☐☐☐ - ☐ *Unemployement PIN #* _____

Withholding payment schedule	
☐ MONTHLY	SUI Rate: ____%
☐ SEMI-WEEKLY	SDI Rate: ____%
☐ ACA Reporting	

Bank Account Info for withholding payments Bank Name: _____

Account Number: _____ Routing #: _____

PAY SCHEDULE

☐ WEEKLY ☐ BI-WEEKLY

☐ MONTHLY ☐ QUARTERLY

☐ SEMI-MONTHLY ☐ ANNUALLY

Pay Day or Date(s): _____

Begin: _____ End: _____

First Check Date: _____

Starting Check #: _____ ☐ NO Payroll this Year

Date of Last Payroll: _____ ☐ Agency Checks

DELIVERY

☐ ***e-Checks*** *- employee paystubs*
(See Authorization for Direct Deposit)

☐ On check date? Time: _____

☐ Alternative Date: _____

(additional fee of $3 per check. $1.75 billed by Quickbooks $1.25 billed by us)

☐ ***Email Paychecks in pdf and you write or print the checks***

☐ ***You supply check stock and we print the payroll for pick up***

If you don't have a State Withholding number or Unemployment account are you going to obtain it yourself or would you like us to do it for you?

☐ **I will do it and have the numbers to you within the next 2 weeks**

☐ **Please do it for me. I understand that I will be billed $59 for this service.**

Authorized Signature: _____ Date: _____

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