



ACCOUNTING. BOOKKEEPING. TAX SERVICES.

Payroll Client Intake Form

Business Type: _____

Specific Category _____

1099 Help

Initial Consultation:				Referred by:							
First Visit:				Thank you sent:							
NL	Y	N	Completed	HC	Y	N	Completed	BC	Y	N	Completed

Business Name

Address

City **State** **Zip**

Contact Person, Position: **Date of Birth:**

Spouse: **Interests/Hobbies:**

Business Phone: **Cell:**

Business Fax: **E-mail:**

Preferred Method of Contact: **Best Time to Reach:**

What is the nature of the business?

Federal Id #: **# of years in business:**

Number of Employees: **Annual Revenues:**

Sole Proprietorship	<input type="checkbox"/>	Corporation	<input type="checkbox"/>	S-Corp	<input type="checkbox"/>	LLC	<input type="checkbox"/>
Partnership	<input type="checkbox"/>	Non Profit	<input type="checkbox"/>	LLP	<input type="checkbox"/>	Individual	<input type="checkbox"/>

Name(s) of owner(s), partner(s), or proprietor(s):

Name: Title: %ownership?:

Address: City State Zip

Phone: Fax: Email:

Name: Title: %ownership?:

Address: City State Zip

Phone: Fax: Email:

Name of CPA/Tax Accountant:

Name:

Address: City State Zip

Phone: Fax: Email:

Payment Information

EFT Authorization Date: Online Bill Payment:

Routing Number Client Set Up Date:

Account Number Verification Date:

Transfer Date First Payment Date

Amount Amount

Payment Frequency Payment Frequency

Accounting Budget per month: **Estimate of Services:**



Payroll Client Intake Form

Who does your payroll currently? _____

If so, what do they charge? _____

What is your pay frequency? _____

How many employees do you have? _____

Do you have current W-4 information for all employees? _____

Do you have I-9 information for all employees? _____

Do you want us to print checks, or will you prepare paychecks? _____

Do you offer direct deposit, or would you like to offer direct deposit? _____

Do you track paid time off? _____

Do you offer benefits to your employees? _____

Do your employees get bonuses? _____

Do your employees get commissions? _____

Are you interested in pay as you go workers compensation? _____

Do you have documentation of your state unemployment rate? _____

What is your state unemployment number? _____

Do you have employees who live outside of NH? _____

If so, what are the state ID numbers for those states? _____

Do you have non-employees that will make over \$600 this year? _____

If beginning payroll services mid-year, do you have prior payroll reports? _____

What is your bank account number for paying payroll and tax liabilities? _____

What is your routing number used for paying payroll and tax liabilities? _____

Are you registered with EFTPS? _____

Are you enrolled for Efile? _____

Do you use QuickBooks? _____

Will you prepare journal entries for payroll, if needed? _____

If so, how do you record your payroll? _____

