

NEW CLIENT INFORMATION

Check all that apply:

- Monthly Financial Preparation
- Sales Tax Processing
- Payroll Processing
- New Client
- Existing Client

Business Name _____ Date _____

Trade Name / DBA _____

Federal Identification Number (FEIN) _____

Entity Type: Sole Prop Partnership Limited Liability Company C Corp S Corp

Business Description _____

Service Based Product Based Other _____

Address: _____

City, State: _____ Zip Code: _____

Owner Name: _____

Contact Name (if different): _____

Email: _____

Phone: _____ Fax: _____

MONTHLY FINANCIAL PREPARATION / SALES TAX PROCESSING

Accounting Start Date _____

Previous Financial Preparation Method

QuickBooks Desktop QuickBooks Online Other _____

Financial Document Submission to Accountant (circle one) Drop off US Mail Other _____

Delivery of Financial Documents to Client (circle one) Pickup US Mail Other _____

State Sales Tax # _____

PAYROLL PROCESSING

State Withholding # _____

Department of Labor Employer # _____ Tax Rate _____

Type of Tax Depositor (existing business – circle one): Semi-Weekly Monthly Quarterly

Pay Cycle (circle one): Weekly Biweekly Semimonthly Monthly

Day of Week Paid: _____ Beginning Pay Period Date: _____

Will you have tipped employees? Yes No

If yes, will tips be paid out in **cash** or added to the employee’s **net check**? _____

Will your employees have payroll deductions? Yes No
(example: uniforms, medical, dental, retirement)

Will you provide sick and/or vacation to your employees? Yes No

PAYROLL REMITTANCE AND DELIVERY

1ST Payroll Check Date: _____

Payroll Submission (circle one): Email Fax Other: _____

Payroll Delivery (circle one): Pickup Email Priority Mail (fee) Fed-Ex (fee)

E-VERIFY

The state of Georgia requires that all private employers who have 10 or more employees (as of January 1, 2013) must report new hires using the federal E-Verify system. As an employer, you can perform the E-verification yourself, or DPP can process for a fee of \$4.95 per employee.

Will you have 10 or more employees? Yes No

If yes, (circle one): I will report new hires DPP will report new hires

EMPLOYEE PORTAL

Employee paycheck stubs and W2s can now be delivered electronically through our Employee Portal. The fee is \$199 per year. If you choose to participate, please provide an email address for each employee for registration purposes.

Form Completed By _____

Title _____

Date _____