

NEW PAYROLL CLIENT CHECKLIST

- Completed New Client Information Form

- Completed ACH Draft Authorization Form

- Signed Form 8655

- Provide copies of Year to Date payroll information, if applicable
 - Weekly payroll summary if a semi-weekly federal tax depositor
 - Monthly payroll summary for all other federal tax depositors

- Provide copies of all previously filed payroll tax forms for the current year
 - Form 941
 - Form DOL-4(n) – State Unemployment Form
 - Form G-7 – State Withholding Form

- Completed Employee Packet for each employee