

WHAT TO BRING TO YOUR NEW PAYROLL APPOINTMENT - BUSINESSES

Thank you for choosing Tax & Financial Solutions to process your payroll. We have a highly experienced and qualified payroll team who know all the latest payroll regulation changes. We will take the time and effort to analyze your specific payroll needs to identify and recommend the best and most convenient payroll strategy for your business.

To ensure the preparation of your payroll goes smoothly, please bring the following items to your scheduled payroll appointment.

Note: Do not bring electronic files, thumb drives, etc. to the meeting. Kindly bring physical hard copies of all applicable documents.

1. ALL EXISTING PAYROLL INFORMATION FOR CURRENT YEAR

- a. Quarterly Reports
- b. Payroll Journals
- c. Federal ID #
- d. State BID #
- e. EFTPS passwords or PIN # (if applicable)**
- f. State Unemployment Insurance rates
- g. W-4 for every employee unless the payroll information provided already supplies that information
- h. EFT Information plus PIN or password**

****If EFT or EFTPS is not already set up please provide a VOIDED check.**

2. Does your business issue 1099s?

- a. W-9 for each person
- b. Process by which we will get future 1099 payment information (suggested format on back)

3. FEES

- a. Your Payroll Specialist will be able to provide you an individualized fee schedule, but generally payroll fees are assessed on the forms and number of checks needed. For instance, in general a 1 person payroll with a once a month pay schedule is approximately \$70 per month including checks, deposits and quarterly reports.

NOTE: you have questions with respect to what to bring to your appointment, please call us at (503) 666-7909 and speak to a Payroll Specialist.

