



Tax Form Check List

Tax Documentation per EIN to be setup:

- ☐ EIN documentation from the IRS
- ☐ Copy of all Federal 941's 940 and State returns for the current year for each state filed
- ☐ Copy of Federal Letter showing the following: Legal Name and FEIN
- ☐ For any taxes that you are exempt from withholding, provide all documentation for that exemption

Occupational Codes

- ☐ If you are in AK, LA or IN, we will need the Occupational Codes you utilize

State Workers' Comp Code reporting

- ☐ If you are in WA or WY, we will need the Workers' Comp Code and Class used for reporting

Geo Code

- ☐ If you are in AK we will need the Geo Codes using for reporting

State Income Tax

- ☐ A current copy of tax withholding frequency notice.

State Unemployment Tax

- ☐ A current copy of tax SUTA rate notice

Social Security Numbers

- ☐ Client should review Employees Social Security numbers for accuracy-Tax cannot process returns for missing, invalid and SS's start with nines.

Unsupported Taxes

- ☐ Taxes Client is responsible to andle: New York SDI, New York FLI, Hawaii SDI