

Hello,

Are you ready to work? We sure are! In order to start the foundation of our beautiful partnership we request the following things:

- Accept the link to your client portal (all documents must be submitted there)
- Current contact information: physical and mailing address, phone number etc
- Provide a copy of your Employment Identification Number (EIN)
<https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
- Copy of Articles of incorporation, organization or Operation Policy (if applicable)
- Payroll schedule and employee handbook (If applicable)
- Provide a copy of your Secretary of State Number (If applicable)
- Sales Tax Account Information (If applicable)
- Prior year tax returns (2 years)
- Copies Bank, Credit Card, Loan statement begin with the month prior to engagement unless “Catch up” work is request. **Remember “Catch up” is bill at the standard rate**
- Accountant access to your QuickBooks, Xero, or Account suite.
- Accountant access to A/P via Billpay or Veem(preferred)

Your success is vital to our success. Let's win together.

Kimberliann Chambers