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NEW CLIENT SET-UP FORM

This New Client Set-Up Form and all other forms included in this packet must be completed, signed and dated by a registered owner or officer in order to prevent any delays in processing.

How did you hear about Precisely Payroll? E-mail Postcard Ad Chamber Friend Other _____

Current Payroll Method: In-house Outsource: _____ Number of Employees: _____

Common Name/DBA: _____

Legal Name: _____
 (Please include entity type i.e.. Sole Proprietor, LLC, INC, Non-Profit)

Company Address: _____

City: _____ State: _____ Zip: _____ E-mail: _____

Contact Name: _____ Phone: () _____ Fax: () _____

PAYROLL PROCESSING

Pay Schedule

- Weekly Monthly
- Bi-Weekly Quarterly
- Semi-Monthly Annually

Pay Date(s): _____

Pay Cycle

Start: _____ End: _____
 Starting Check #: _____
 Date of Last Payroll: _____
 First Process Date: _____

Processing Options

- Direct Deposit
- Agency Checks/Garnishments
- Time & Attendance/Timeclock
- Stuff & Seal Checks

PAYROLL TAXES

Full tax service? YES NO

Federal Tax deposit schedule: MONTHLY SEMI-WEEKLY

Federal EIN:

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Oregon State BIN:

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Do you have any agricultural employees? YES NO

Other State EIN: _____

FINANCIAL TEAM

Bookkeeper: _____

CC Payroll Reports? YES NO

CC to email: _____

CPA: _____

Attorney: _____

Retirement: _____

Need a referral? Just ask your Payroll Specialist!

DELIVERY

Payday Reports: Standard Delivery Pick-Up

E-mail PDF to: _____

Password:

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Employee Paystubs:

- Standard Delivery Pick-Up
- Email (see Direct Deposit & E-Stub Authorization)
- Email check on pay date? Time: _____

Standard Delivery Instructions: Mail Courier

Delivery Address:

Attention: _____

Address: _____

City: _____ State: _____ Zip: _____