



BARMAR, Inc.
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Lincoln, NE 68502

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Client Information Checklist

Name: _____

Information Needed for All Clients:

- Name, SSN, address (home & business), phone number, email address for each shareholder/owner/partner of the business
- Federal tax ID
- EFTPS (Electronic Federal Tax Payment System) letter from Dept. of Treasury with PIN
- Operating Agreement, By-Laws, Stock Certificate for the business (business documents provided by attorney when company was originally created)
- Copy of previous year tax return, both personal and business
- A voided business check

Information Needed for Established Companies:

- State ID along with password and PIN for electronic payroll tax submissions (available from previous payroll processor)
- EFTPS username and PIN (available from previous payroll processor)
- Nebraska Unemployment ID along with the password and PIN for electronic tax submissions (available from previous payroll processor)
- A copy of the S-election letter if available
- Copies of all previous year payroll tax forms filed for your company, including any W-2's
- Copies of current year payroll tax forms filed for your company, including any W-2's
- If you use Quick Books, a backup copy of the Quick Books file
- Copies of current year bank statements including deposit and check images (Bookkeeping clients only)

This information can be uploaded to our secure portal (please call or email us for a secure upload link) or you can drop it off at our office anytime. There is a mail slot next to our front door if you drop information off after hours