



Payroll Information Request Form

Preliminary information for evaluating payroll needs and appropriate next steps

Information-request form only

Checking a service does not create an engagement or authorize payroll activity.

1. Business Information

Legal business name

DBA/trade name

Owner/contact name

Phone

Email

Business address

City / State / ZIP

EIN

Entity type

State of formation

Business start date

Industry

Protect the EIN

If returning this form through ordinary unsecured email, leave the EIN blank and provide it later using the approved secure method.

2. Payroll Service Requested

- | | |
|--|--|
| ☐ New payroll setup | ☐ Year-end payroll support |
| ☐ Ongoing payroll processing | ☐ W-2 support |
| ☐ Payroll cleanup | ☐ 1099 contractor reporting support |
| ☐ Prior-period correction | ☐ Payroll tax notice assistance |
| ☐ Quarterly payroll reporting support | ☐ Other |

Preliminary selection

Checking a service identifies an area for discussion only and does not create an engagement.

3. Current Payroll System

Current provider/software

Payroll currently active? Yes / No

Last payroll date

Payroll frequency

Number of employees

Number of contractors

States where employees work

Records current? Yes / No / Unsure

4. Employee Overview

Approximate employee count

Salaried employees

Hourly employees

Full-time employees

Part-time employees

Employees in multiple states? Yes / No / Unsure

High-level information only

Do not provide employee Social Security numbers, bank-account numbers, driver's-license numbers, I-9 documents, W-4 details, or other sensitive employee data. Detailed information will be requested later through an approved secure process.

5. Payroll Schedule

☐ Weekly☐ Semimonthly☐ Other☐ Biweekly☐ Monthly

Typical pay date

Pay-period ending date

Next intended payroll date

Other schedule details

6. Compensation

☐ Hourly wages☐ Bonuses☐ Reimbursements☐ Salary☐ Commissions☐ Owner/officer compensation☐ Overtime☐ Tips☐ Other compensation

Scope

This form records compensation categories only; it does not determine tax treatment.

7. Benefits and Deductions

☐ Health insurance☐ Child support☐ Retirement plan☐ Employee advances☐ HSA☐ Other deductions☐ Garnishments☐ None / not sure

No account or health details

Do not provide account numbers or detailed health information on this form.

8. Payroll Tax Accounts

- | | |
|--|--|
| ☐ Federal EIN | ☐ Washington workers' compensation account |
| ☐ EFTPS enrollment | ☐ Other state payroll accounts |
| ☐ Washington unemployment account | ☐ Local payroll-tax accounts, if applicable |

Filings current? Yes / No / Unsure

States/localities involved

No credentials

Do not provide passwords, PINs, MFA codes, EFTPS credentials, or authentication information.

9. Prior Payroll Filings

- | | |
|-------------------------------------|---|
| ☐ Forms 941 | ☐ State unemployment reports |
| ☐ Form 940 | ☐ Workers' compensation reports |
| ☐ W-2/W-3 | ☐ Other applicable payroll filings |
| ☐ Forms 1099 | |

Notices exist? Yes / No / Unsure

Outstanding balances? Yes / No / Unsure

10. Payroll Notices or Problems

- | | |
|---|--|
| ☐ Late payroll filings | ☐ Missing W-2 |
| ☐ Unpaid payroll tax | ☐ Employee classification concern |
| ☐ IRS notice | ☐ Contractor classification concern |
| ☐ State notice | ☐ Prior-provider issue |
| ☐ Incorrect W-2 | ☐ Other |

Brief description - do not include sensitive identifiers

No legal determination

Selecting a concern does not provide a legal or worker-classification determination.

11. Records Available

- | | | |
|--|--|--|
| ☐ Prior payroll reports | ☐ Employee earnings reports | ☐ State payroll reports |
| ☐ Quarterly payroll filings | ☐ Prior W-2/W-3 | ☐ Payroll-tax notices |
| ☐ Annual payroll filings | ☐ Contractor reports | ☐ Other |

12. Secure-Information Notice

Protect sensitive payroll information

For your security, do not enter or send Social Security numbers, employee bank information, Forms W-4, I-9 documents, driver's-license copies, payroll-system passwords, EFTPS credentials, MFA codes, or other authentication information through ordinary unsecured email or this general information-request form. ProfitWise Solutions will provide an approved secure method when detailed payroll records are required.

13. Limitation Statement

Preliminary information only

Submitting this form does not create a payroll engagement or contract and does not authorize ProfitWise Solutions to process payroll, initiate ACH or other transactions, make tax deposits, file returns, access bank or payroll accounts, or act under Forms 8655, 8821, or 2848. Separate engagement terms and authorizations may be required before services begin.

14. Client Acknowledgment

I understand that the information provided is preliminary and accurate to the best of my knowledge. I have reviewed the security and limitation notices above. My signature acknowledges this information only and is not an authorization or engagement agreement.

Name

Date

Signature

Preferred follow-up

Additional comments or questions