

Burr Business Service

1655 South 25th Street
Lincoln, NE 68502

402-477-3822
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burrbusiness@windstream.net

New Client Checklist – Information Needed

- Legal business name, business address, business phone number, business email address
- Full name, SSN, address, phone number, email address, for each business owner/partner/shareholder
- Previous year tax return
- Business By-Laws
- Business Operating Agreement
- Voided check from business checking account
- S-election acceptance letter, if available
- Federal ID printout with password and PIN (EFTPS)
- State ID with password and PIN
- NE Unemployment ID with password and PIN
- Current W-4 for all employees
- Current I-9 (first page only) for all employees
- Direct deposit form for all employees with a voided check