



JAM FINANCIAL SERVICES

OFFICE: 1.919.556.5993

New Client Profile

FAX: 1.866.977.6077

Legal name: _____ DBA name: _____

Name for Checks: _____

Full Contact Name & Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

Email: _____ Web Site: _____

PAY FREQUENCY:

Pay Frequency: Weekly or Bi-weekly or Semi Monthly or Monthly or Multiple Frequency

If Semi-Monthly or Monthly, list pay dates: Pay Day #1: _____ Pay Day #2: _____

Workweek: (ex. Sun.-Sat. or Mon.-Sun.) _____ Day of payday: _____

TAX INFORMATION:

Federal EIN: _____ State Tax Deposit EIN: _____

State Unemployment ID#: _____ State Unemployment tax rate %: _____

For ID# you do not have, would you like for Time & Payroll to apply for them? _____

ADDITIONAL INFORMATION:

Direct Deposit: _____ Time Clock: _____ Total # of employees: _____

Delivery Options: UPS Next Day _____ FedEx Overnight _____ Email _____

Pick Up _____ US Mail _____ (not recommended)

OVERTIME & HOLIDAYS

Overtime rules: _____

Paid Holidays: _____ Hours: _____

Christmas	Christmas Eve	Columbus Day	Easter
Election Day	Flag Day	Fourth of July	Good Friday
Labor Day	Martin Luther King, Jr.	Memorial Day	New Years Eve
President's Day	Thanksgiving	Thanksgiving Friday	Veterans Day

DEDUCTIONS:

List of Payroll Deductions (*401k, Health Ins., Dental, Life, etc.*)

Name _____

Type _____

Frequency _____

Maximum amount per year _____

Employee/employer benefits matching: _____

PLEASE ATTACH A COPY OF THE FOLLOWING:

Voided company check
Copy of the debit authorization for Direct Deposit and/or electronic billing
State Unemployment reports
Form 941's
Schedule B's
State Tax reports for each quarter
Any past payroll history
Tax coupon books you have for federal, state or unemployment taxes.

SIGNATURE WITH TITLE

DATE