

The following documents are required to process the change of legal information and ensure an accurate and timely change to the Federal Employer Identification Number (FEIN) for your business.

Please submit the following forms completed in their entirety, along with the requested information from the IRS and State Agency(s).

Included in this Packet

- Determination of Successor Status
- Contact Change Form (Company and Contact changes)

Provided to you by Tax Agencies

- IRS Proof of New FEIN (IRS Generated Document)
- State Withholding and/or Unemployment numbers that coincide with your new FEIN

Forms must be signed by the authorized Principal of the business and emailed to entitychanges@intuit.com.

If you have not already notified the State Agency(s) that handle Withholding Tax and/or Unemployment Insurance Tax of the new FEIN, contact the agency(s) immediately to report the changes.

Please obtain and forward the new state account information, Intuit requires this information to process the entity change.

Continue processing payroll as normal. Intuit will move all appropriate payroll taxes to the new FEIN as required to support tax filings.

Important Note: Be advised the transferring of tax deposits or filing of amendments will lead to notices from the IRS and State Agency(s). If you receive discrepancy notifications from any agency, forward to Intuit immediately, via email to taxnoticeresolution@intuit.com. The Entity Change process could also result in an erroneous refund from the IRS or State Agency(s). Do not cash any refund checks. Intuit will confirm their validity and advise you of the next steps.

Determination of Successor Status

Company Name: New FEIN:
Company Address: Old FEIN:
City: State: Zip Code:

Please review the information below and mark the appropriate box. If needed, consult with your CPA or Legal Aid

Start of new FEIN - Year and Quarter

Year Q1 (1/1 - 3/31) Q2 (4/1 - 6/30) Q3 (7/1 - 9/30) Q4 (10/1 - 12/31)

Intuit Payroll is not authorized to determine your company's successor status

The new Federal Identification Number does qualify as a Successor

Common examples of successors:

- Change in tax status (incorporating, adding a partner, etc.) without significant change to everyday business
- Sale of a company without significant change to everyday business

Payroll and tax implications:

- You will NOT start a new company file. Your existing payroll company file will be updated to reflect your new FEIN
- Wages paid by the predecessor in the same calendar year will be used in calculating tax limits. You will receive one set of W-2 forms at year-end using the new FEIN and referencing the predecessor FEIN
- We will finalize (close) the old FEIN with the IRS

The new Federal Identification Number does NOT qualify as a Successor

Common examples of non-successors:

- Sales, mergers or acquisitions with significant organizational change to the business
- "Split" companies in which the former FEIN remains active

Payroll and tax implications:

- You will receive a new payroll data file and/or company number
- Your employees will have to re-meet wage limits for Social Security, unemployment tax, and State Disability Insurance where applicable
- You will receive two sets of W-2 Forms for mid-year entity changes, one set for each FEIN
- We will finalize (close) your old FEIN with the IRS if you will no longer be processing payroll under that number

Signature: Date:

Title:

Enrollment Form ****Contact & DBA changes must in done in QuickBooks Online****

COMPANY INFORMATION

Legal Name: DBA:

Company Address:

City: State: Zip Code:

Phone Number:

AUTHORIZED PRINCIPAL(S) INFORMATION

Authorized Principal #1

Name:

Email:

Social Security Number: Date of Birth:

Authorized Principal #2

Name:

Email:

Social Security Number: Date of Birth:

PAYROLL ADMINISTRATOR

Main contact person for your day to day payroll and related issues and activities. The Payroll Administrator should be someone who actually processes payroll for your company, who has access to all payroll information and who can answer questions on the company's behalf regarding details of your company's payroll. Only one Payroll Administrator is allowed.

Payroll Administrator:

Email: Phone Number:

PAYROLL CONTACT

Authorized to ask questions about how the payroll service works. No confidential information will be given to this person. This person is not allowed to make any account changes or payroll changes. More than one Payroll Contact is allowed.

Payroll Contact #1

Payroll Contact:

Email: Phone Number:

ADD
 CHANGE
 DELETE

Payroll Contact #2

Payroll Contact:

Email: Phone Number:

ADD
 CHANGE
 DELETE