

## Bookkeeping/Payroll Submittal

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* **Bookkeeping/Payroll Submittal**

#### **BOOKKEEPING/PAYROLL SUBMITTAL**

Intake form for Bookkeeping/Payroll Clients.

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#### **ATP BOOKKEEPING/PAYROLL SUBMITTAL**

###### **Business Information**

Entity Type\*:

EIN\*:
Please fill out this field.

Full Business Legal Name\*:
Please fill out this field.

Address\*:
Please fill out this field.

Address Line 2:

City\*:
Please fill out this field.

State\*:
Please fill out this field.

Zip Code\*:
Please fill out this field.

Business Phone Number\*:
Please fill out this field.

Fax Number:

Business Email:

Website:

#### **Owner Information**

Name\*
Please fill out this field.
Please fill out this field.

SSN\*
Please fill out this field.

Address\*
Please fill out this field.

Please fill out this field.
Please fill out this field.
Please fill out this field.

Phone\*
Please fill out this field.

Email\*
Please fill out this field.

Preferred Method of Contact\*
Undefined value was submitted through this field.

Primary Contact\*
YesNoUndefined value was submitted through this field.

Add Owner +

Payment for Services ACH Authorization

We require all bookkeeping/payroll clients set up automatic payments. You are hereby authorizing Affordable Tax Prep & Bookkeeping Services LLC to initiate an electronic debit, to create and process a demand draft against your bank account, or charge your credit card in such amounts that billed for services according to invoices sent, according to the terms outlined below . Please note that if the demand draft gets returned to us there is a $20 return ACH fee that will be charged.

In order to keep our prices low, Affordable Tax Prep & Bookkeeping Services offers a cash discount if you use ACH. Please note that if the demand draft gets returned to us there is a $20 return ACH fee that will be charged. You understand that if you choose to use a Credit Card instead of a Bank Draft, that you will be charged an additional 3.75% on top of your invoiced amount. This 3.75% is a fee that the credit card processing company charges and not something Affordable Tax Prep & Bookkeeping Services charges.

ACH or Credit Card?\*
Bank AccountCredit CardPlease fill out this field.

This authorization is to be effective immediately and remain in full force until Client notifies Affordable Tax Prep & Bookkeeping Services of its cancellation by sending written notice in such time and in such manner to allow both Affordable Tax Prep & Bookkeeping Services and the receiving financial institution a reasonable opportunity to act on it.

#### **Schedule of Service Packages Being Agreed Upon**

Bookkeeping Services & Payroll Services

Soloprenuer Business Package $200/monthApprentince Business Package $350/monthJourneyman Business Package $500/monthExperienced Business Package $750/monthMaster Business Package $1200/monthPayrollCleanup

QuickBooks Version\*

Your Name\*

Title\*

Date\*

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