

NannyTax LLC New Client Information Form

Please complete top section only (bolded) before faxing to us. Thank you.

A note about our policies...we will never share your information with anyone (EVER, PERIOD, END OF DISCUSSION)

How did you hear about us: _____

Today's date: _____ **Please complete and fax to: (646)-885-4272**

Name: _____ **Spouse Name:** _____

Address: _____

City, State, Zip: _____

County: _____

Work Tel: _____ **Work Fax:** _____

Home Tel: _____ **Home Fax:** _____

Email Address: _____

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We'll need this if you become a client....

Taxpayer SSN _____ Spouse SSN _____

Date Started: _____ Date first wage: _____

Live-in or Live- out: _____ Weekly wage: _____

Discuss workers compensation and disability issues with client: Wants it YES / NO

Fee Quote: Start up _____ Quarterly: _____

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For NannyTax LLC Office Use Only

Register in:	Husband	Wife	Both	names.	By	Date
1.				Welcome letter and POA	_____	_____
2.				Email address in AOL	_____	_____
3.				Copy of bill to bookkeeper	_____	_____
4.				ID number application to IRS	_____	_____
5.				Enter fed I.D. Number into computer	_____	_____
6.				Letter D to client	_____	_____
7.				Start up forms to client (W-4, I-9)	_____	_____
8.				State registrations (income, labor)	_____	_____
9.				Enter state numbers into computer	_____	_____
10.				WC/DBL application (discuss with AG)	_____	_____