



2025 Worthington Ct
Macungie Pa 10862
1.866.200.3745 clientinfo@jftgroup.org

New Client Questionnaire:

Corporation information: Ein Formed? (Date)

State:

Company Structure:

Address: Location:

Company address if different:

Owner (s) Information: with percentages owned.

Fiscal Year or Annual?

Services offered:

Sales Tax:

Do you require payroll?

Paper checks or direct deposit?

Account numbers:

Fed: EIN Feds

State: PA Others ____

Current payroll agent, we will be replacing them on etides.

Contact, number and any other info:

Sales and use Tax:

Employer Withholding:

Corporate Tax:

Other Tax Types:

Unemployment Compensation:

Services required:

Payroll

Bookkeeping – all bills will be signed by the appropriate party before pickup. Credits will be applied to the proper invoice.

Printing of checks after approved

Monthly reconciliation of check books and credit cards.

Storage of paid bills to month/ quarterly / annually end will be returned in a sealed box /Envelope.

24-hour Access to our server to print checks if needed and or run reports check on you company.

Accounting services as they arise.

Tax preparation

Tax relief

Open or pending urgent matters.