

TRAVIS RAML, CPA ASSOCIATES, LLC

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New Client Setup

Dear Client,

We would like to take this opportunity to thank you for choosing Columbia Payroll & Financial Services, LLC as your payroll service provider. The instructions listed below will guide you through the setup process. If you have any questions about the setup process that are not adequately answered by the following steps please feel free to email us at info@ramlcpa.com or call 888-941-1120 and ask for customer service.

Required forms to be submitted

- 1) An [Employer Information Form](#) should be completed and submitted. The form can be submitted securely online by clicking the “SUBMIT FORM” button at the bottom of the page.
- 2) An [Employee Information Form](#) should be completed and submitted for each employee/contractor. For contractors please type “1099 Contractor” in the Additional Information field. The form can be submitted securely online by clicking the “SUBMIT FORM” button at the bottom of the page.
- 3) Please fax a copy of a voided company check (from the account the funds will be deducted from) to 877-803-3434.
- 4) If the employee / contractor would like to have direct deposits please have each individual complete a [Direct Deposit Authorization Form](#). Please fax this form and a voided check from the individual to 877-803-3434.
- 5) Complete an [ACH Authorization Form](#) to allow Columbia Payroll & Financial Services, LLC to withdrawal payroll fees directly from your account.
- 6) If this is not your first payroll of the year, please submit the most current YTD payroll registers and full year payroll tax deposit reports.

Forms to be completed and kept on file

- 1) Each employee should complete a [Federal W-4 Form](#).
- 2) A [Federal I-9 Form](#) should be completed for each new employee to determine their employment eligibility.
- 3) Each contractor should complete a [Federal W-9 Form](#).

Once again thank you for choosing Columbia Payroll & Financial Services, LLC.