

Entity Department
6884 Sierra Center Parkway
Reno, NV 89511

Dear Tax Client,

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).

1. Determination of Successor Status
2. IRS Proof – IRS Documentation (Form SS-4)
3. State Withholding and/or Unemployment numbers that coincide with your new EIN.
4. Entity Change Fee Debit Authorization Letter

Forms must be signed by the authorized Principal of the business and emailed to entitychanges@intuit.com, along with proof of the new FEIN. If you are not able to email the signed documents please fax them to 877-471-2801.

If you have not already notified the State Agency(s) who handles 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 running your payroll normally. 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 notification from any agency, forward to Intuit immediately, by email to taxnotice@intuit.com or via fax to 866-293-1994. 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

NEW COMPANY NAME: _____ NEW EIN: _____
NEW COMPANY ADDRESS: _____ OLD EIN: _____
CITY: _____ STATE: _____ ZIP: _____

Please review this information and mark the appropriate box. If needed, consult your CPA or legal aid.

The Entity Department is not authorized to determine your company's successor status.

Definition of Successorship: When an employer acquires substantially all of the property used by the predecessor in its business and employs individual who immediately prior to the acquisition were employed by the predecessor. [IRS Reg. 31.312(a)]

PAYROLL CHECK DATE TO START PAYROLL ON EIN: _____

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 EIN.
Wages paid by the predecessor in the same calendar year will be used in calculating tax limits.
You will receive one set of Forms W2 at year-end using the new EIN and referencing the predecessor EIN. We will finalize (close) the old EIN with the IRS.

The new Federal Identification Number does NOT qualify as a Successor.

Common examples of successors:

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

Payroll and tax implications:

You will receive a new payroll date 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 Forms W2 for mid-year entity changes, one set for each EIN that year.
We will finalize (close) your old EIN with the IRS if you will be no longer processing payroll under that number.

Signature: _____ Date: _____
(Principal Signature Only)

Title: _____

NOTE: Any changes made to this agreement **after** the date signed will result in additional fees.

Entity Change Fee Information

Entity Department
6884 Sierra Center Parkway
Reno, NV 89511

Dear Tax Client,

We have received your request for a Federal Identification Number (FEIN) change. Your account will require special handling, therefore an additional charge will apply.

To process the Entity Change, we will need to debit your payroll account **\$150.00**. Services provided for this fee include finalizing your old FEIN with the IRS, transferring tax deposits if required and responding to notices from Federal and State Agency(s).

If the effective date for the new FEIN is dated back to a prior year or quarter, there will be additional amendment fees charged. The fee is \$50.00 per tax filing amended and \$10 per W2 amended.

Important Note: If this letter is not enclosed with the contract packet, we will be unable to process your request.

Authorization

I hereby state that I am a principal authorized signer of this company and by signing below I grant permission to debit my account the amount documented in this notice.

Authorized Principal Signature: _____ Title: _____

Print Name: _____ Date: _____

Old FEIN: _____

New FEIN: _____

Intuit Full Service Payroll



Contact Changes

This form is to make changes to your account. Please fill out each section that applied to the changes you are making.

Company Information

Company Legal Name: _____ FEIN _____

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

PAYROLL ADMINISTRATOR: _____

EMAIL ADDRESS: _____ PHONE NUMBER _____ EXT _____

Payroll Contact Change: (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 or payroll changes. More than one Contact person allowed.)

PAYROLL CONTACT _____ Add Change Delete

EMAIL ADDRESS _____ PHONE NUMBER _____ EXT _____

PAYROLL CONTACT _____ Add Change Delete

EMAIL ADDRESS _____ PHONE NUMBER _____ EXT _____

PAYROLL CONTACT _____ Add Change Delete

EMAIL ADDRESS _____ PHONE NUMBER _____ EXT _____

General Company Information

PHONE NUMBER _____ FAX NUMBER _____

Authorization

I hereby state that I am an authorized signer of this company, and by signing below I acknowledge and understand that Intuit will update this request. I agree to accept any and all liability for the change to the account.

Authorized Principal Signature

Title

Print Name

Date