

New Employee Packet Checklist



SECTION 1

New EE Info

- Employee to complete, **must** sign and date.
- Client to complete Client Company section, must sign.

W-4 Form

- If Employee wants to be exempt, do not enter in box 3, 5 or 6.
- If Employee wants federal withholding, do not enter EXEMPT in box 7.
- If exempt, form needs to be completed each year.
- Employee must sign and date.

State Withholding Form

- Indiana Employees to enter county of residence and employment as of January 1st.
- Employees who live AND work in another state must complete tax form for their state of employment.
- Employee must sign and date.

Authorization for Direct Deposit

- Entire check must be direct deposit, multiple account designation available.
- Each account must have pre-printed ACH routing and account number from bank
- Pre-printed documents accepted:
 - COPY OF CHECK, LETTER FROM BANK OR DIRECT DEPOSIT FORM FROM BANK**
 - EMPLOYEE MUST SIGN AUTHORIZATION FORM**
 - DEPOSIT SLIPS WILL NOT BE ACCEPTED**

I-9 Form & Self Identification Form

(To be retained by Employer – DO NOT Return to Aspire CPAs)

- Employee to complete section 1, must sign and date.
Employer to complete remainder of the form.
- Make sure appropriate identification is supplied with this form (see List of Acceptable Documents), include with I-9 Form.

Return By e-mail to payroll@aspirecpas.com

If unable to return by e-mail please

Return By Fax: 317-469-4700