W-2 Client Checklist

What we need from the business or organization requesting W-2 preparation and filing services.

1. Business or Employer Information

- Legal business or organization name
- Business mailing address
- Employer Identification Number (EIN)
- Business phone number
- Business email address
- Name and contact information of the authorized representative
- Business entity type (LLC, Corporation, Nonprofit, Sole Proprietor, etc.)

2. Payroll Information

- Total number of employees receiving W-2s
- Employee payroll records for the tax year
- Total gross wages paid to each employee
- Federal income tax withheld
- Social Security wages and tax withheld
- Medicare wages and tax withheld
- State wages and state income tax withheld, if applicable
- Local wages and local income tax withheld, if applicable
- Retirement plan contributions, if applicable
- Health insurance and other taxable benefits, if applicable
- Bonuses, commissions, tips, and other taxable compensation, if applicable

3. Employee Information

- Each employee's full legal name
- Each employee's Social Security Number (SSN)
- Each employee's current mailing address
- Employee hire and termination dates, if applicable
- Employee wage and tax details for the year

4. Prior-Year and Filing Records

- Prior-year W-2 copies, if available
- Prior-year W-3, if available
- Final payroll reports for the tax year
- Payroll register or year-end payroll summary
- Copies of amended payroll reports, if applicable
- Confirmation of any W-2s already issued or filed

5. Authorization and Delivery

- Completed service agreement
- Payment of applicable service fees
- Authorization to prepare and file W-2 forms
- Confirmation of authorized electronic filing contact
- Email addresses for secure document delivery
- Confirmation of employee electronic delivery consent, where required