

All in One Tax Services

Sales Tax Client info Sheet

Set up Rates/Requirements:

- An Application fee of **\$25.00** includes set up in our system and application of your state sales tax number if needed.
- **Flat Monthly Rate of \$25.00** for simple filings (Monthly or Quarterly receipts separated and clearly marked) or an **Hourly Rate: \$25.00** billed for more involved filings.
- **Flat Quarterly Rate of \$90.00** or hourly.
- **Flat Annual Rate of \$200.00** or hourly
- You will be billed monthly for work done the previous month; Quarterly for the previous quarter. Payment is due within 15 days of receipt of invoice.
- You will receive proof of payment either via email (preferred) or via mail.
- We require a bank account or valid Credit Card is on file for timely payment of your sales tax. AMEX, MC and Discover are the only cards accepted via the payment site.

Required each period:

1. All sales receipts or records: either for the Month, or for the previous Qtr (if Qtrly, they **MUST** be turned in by the end of the business day on the first day of the next month (To ensure timely filing)
 - a. Receipts being register tapes for the month, organized by month (if quarterly), or sales orders with proof of payment attached.
2. Any changes to contact, account or credit card information (ASAP when change occurs)

Sales Tax ID No. _____

Filing Status: (Circle one): Monthly / Quarterly / Annual

Payment Account information:

Bank Name: _____

Address: _____

City: _____ Zip: _____

Name on account: _____

OR

Credit Card information:

Number: _____ Exp. Date: _____

CCV. _____

Name as it appears on card: _____

Please provide further info you feel would aid in serving you better!
