



Sales Tax Client info Sheet

Set up Rates/Requirements:

- An Application fee of **\$50.00** includes set up in our system and application of your state sales tax number if needed.
- **Flat Monthly Rate of \$55.00 (per account)** 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 \$100.00 (per account).**
- **Flat Annual Rate of \$250.00 (per account)**
- You will be billed monthly for work done the previous month; or quarterly for the previous quarter. Payments are set up on ACH draft from an account of your choice and are processed directly after reports are processed.
- 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.
- If we are unable to process and pay in the same instance, you will be charged a convenience fee for additional time spent (\$35.00)

Required each period:

- 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)
- Or access to appropriate accounts or sales mediums
- Receipts being register tapes for the month, organized by month (if quarterly), or sales orders with proof of payment attached.
- Any changes to contact, account or credit card information must be reported to us (ASAP when change occurs)

Sales Tax ID No. _____

Webfile No. _____

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

Payment Account information:

Bank Name: _____

Address: _____

City: _____ Zip: _____

