3030 E Market St | York, PA 17402
Call or text: 717-759-4227
We'll count the beans... You enjoy the coffee!

Business Information Form

OWNER

Name

Address

Phone Email

DOB Social Security #

Spouse's Name

Spouse's DOB Spouse's Social Security #

If Corp or Multi-Member LLC, please list other officer names:

DOB: Soc Sec #:

DOB: Soc Sec #:

DOB: Soc Sec #:

DOB: Soc Sec #:

BUSINESS

Name

Address

Phone

Email

Entity ☐ Sole prop ☐ LLC ☐ S-corp ☐ C-corp ☐ Nonprofit EIN Industry

Payroll? PA # PAUC # EIT/LST #

Bank Name

Routing # Account #

If you are an LLC, have you filed for an S-Corp election? ☐ Yes ☐ No ☐ Unsure

What does the business do?

Do you have a myPATH account? ☐ Yes ☐ No

Username: Password:

Notes:

Required: EIN letter, business filing documents, and copy of driver's license.

Return this form securely through SmartVault; do not send passwords by email.

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ACCOUNTING & PAYROLL ENGAGEMENT AGREEMENT

1 | Agreement and scope

This agreement is between Accounting Services of York, LLC (ASY) and the client identified below. It covers the bookkeeping, payroll and related services the parties agree ASY will provide. Annual income tax return preparation requires a separate engagement.

Services may include monthly bookkeeping and financial statements, payroll processing and payroll reports, and sales tax filings. ASY will perform only the services selected or otherwise agreed in writing. Monthly financial statements are targeted for delivery by the 14th when complete records are received in time.

2 | Fees and service schedule

Current bookkeeping: $650 per month. Prior-period bookkeeping cleanup: $150 per hour. Payroll: $185 per month plus $6 per employee; no per-check fee. Out-of-state payroll and optional services may involve additional agreed fees.

Sales tax filing: $40 per month. Year-end W-2 printing: $85 for up to 10 W-2s, plus $10 for each W-2 over 10.

This engagement continues month to month unless ended under Section 6. Fees for additional work or changes in services will be communicated and agreed with the client.

3 | Client responsibilities

Provide complete, accurate records, documentation, approvals, employee information and access on time. Review payroll registers and financial statements promptly and notify ASY of discrepancies. The client remains responsible for business decisions, records and timely funding and payment of taxes and other obligations.

For direct deposit, payroll hours are due Wednesday by noon. Late submissions may delay payroll and may incur late fees. The payroll department is closed Fridays. ASY will communicate applicable late fees before they are charged.

4 | Records and professional standards

ASY relies on information supplied by the client and does not audit or verify it unless separately agreed. Services are performed under the professional standards applicable to the agreed work; financial statements are not represented as audited or as complying with GAAP or IFRS unless specifically agreed.

Use SmartVault or another secure method approved by ASY to exchange sensitive records. Do not send Social Security numbers or bank details through ordinary email. ASY will protect client information and retain records in accordance with applicable law and its policies.

5 | Delays, fees and third parties

The client is responsible for penalties, interest and third-party charges attributable to late or inaccurate information, insufficient funds, or the client's failure to approve, fund or pay on time. ASY is responsible for its own work as required by applicable law. Third-party processing and bank fees are separate from ASY service fees unless otherwise agreed.

6 | Suspension and termination

ASY may suspend or terminate services for nonpayment, returned payments, failure to provide information or access, or failure to respond to communications. ASY will give written or verbal notice and a reasonable opportunity to cure of at least three business days and no more than 14 calendar days. The client may end the engagement by notifying ASY. The parties will coordinate outstanding work, records and responsibilities as applicable.

If you wish to terminate services, please request a Letter of Separation at the front desk.

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7 | Dispute resolution

The parties agree first to try in good faith to settle any dispute through mediation administered by the American Arbitration Association under its Rules for Professional Accounting and Related Services Disputes. If the dispute remains unresolved 60 days after notice and a demand to mediate, the parties may proceed to arbitration. Mediation costs will be shared equally by all parties.

8 | Acceptance

By signing, the client accepts the agreed services and terms. Services begin after ASY receives a signed agreement.

Client / authorized representative _____

Company name or DBA _____

Signature _____

Date _____