

New-Employer State Registration: Information Gathering Form

Complete every field that applies. We use this information to register your business for state income-tax withholding and state unemployment (SUI/UC) accounts in each state where you have employees.

Sensitive fields (SSNs, bank account numbers) should be entered only after you save and encrypt the file, or returned via secure portal.

For Internal Use

Client / Company name	Assigned setup rep	HubSpot deal ID
<input type="text"/>	<input type="text"/>	<input type="text"/>
Target first payroll date	Date this form completed	Priority / monetary value
<input type="text"/>	<input type="text"/>	<input type="text"/>

1. Business Identity

Legal information matching IRS records and the Secretary of State filing.

Legal business name (exactly as on IRS letter)	Trade name / DBA (if any)	
<input type="text"/>	<input type="text"/>	
Federal EIN (XX-XXXXXXX)	Entity type (LLC, S-Corp, C-Corp, Partnership, Sole Prop, Nonprofit, Govt)	Federal tax classification (e.g. S-Corp, Disregarded)
<input type="text"/>	<input type="text"/>	<input type="text"/>
State of formation / incorporation	Date formed (MM/DD/YYYY)	Fiscal year end (MM/DD)
<input type="text"/>	<input type="text"/>	<input type="text"/>
NAICS code	SIC code (if known)	Brief description of business activity
<input type="text"/>	<input type="text"/>	<input type="text"/>
Special classifications (check all that apply):		
<input type="checkbox"/> 501(c)(3) nonprofit	<input type="checkbox"/> Government	<input type="checkbox"/> Agricultural
		<input type="checkbox"/> Household/domestic
		<input type="checkbox"/> Franchise

2. Business Addresses & Primary Contact

Legal/mailling street address	Suite / Unit		
<input type="text"/>	<input type="text"/>		
City	State	ZIP	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Physical address (write 'same' if identical to mailing)	County		
<input type="text"/>	<input type="text"/>		
Main business phone	Primary email	Website	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Primary contact name	Title	Direct phone	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. States Where You Have or Will Have Employees

Check every state in which any employee will work, telecommute, or live. We register withholding and UC in each.

- | | | | | | | | | |
|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| <input type="checkbox"/> AL | <input type="checkbox"/> AK | <input type="checkbox"/> AZ | <input type="checkbox"/> AR | <input type="checkbox"/> CA | <input type="checkbox"/> CO | <input type="checkbox"/> CT | <input type="checkbox"/> DE | <input type="checkbox"/> DC |
| <input type="checkbox"/> FL | <input type="checkbox"/> GA | <input type="checkbox"/> HI | <input type="checkbox"/> ID | <input type="checkbox"/> IL | <input type="checkbox"/> IN | <input type="checkbox"/> IA | <input type="checkbox"/> KS | <input type="checkbox"/> KY |
| <input type="checkbox"/> LA | <input type="checkbox"/> ME | <input type="checkbox"/> MD | <input type="checkbox"/> MA | <input type="checkbox"/> MI | <input type="checkbox"/> MN | <input type="checkbox"/> MS | <input type="checkbox"/> MO | <input type="checkbox"/> MT |
| <input type="checkbox"/> NE | <input type="checkbox"/> NV | <input type="checkbox"/> NH | <input type="checkbox"/> NJ | <input type="checkbox"/> NM | <input type="checkbox"/> NY | <input type="checkbox"/> NC | <input type="checkbox"/> ND | <input type="checkbox"/> OH |
| <input type="checkbox"/> OK | <input type="checkbox"/> OR | <input type="checkbox"/> PA | <input type="checkbox"/> RI | <input type="checkbox"/> SC | <input type="checkbox"/> SD | <input type="checkbox"/> TN | <input type="checkbox"/> TX | <input type="checkbox"/> UT |
| <input type="checkbox"/> VT | <input type="checkbox"/> VA | <input type="checkbox"/> WA | <input type="checkbox"/> WV | <input type="checkbox"/> WI | <input type="checkbox"/> WY | <input type="checkbox"/> PR | | |

Note any additional U.S. territories or special situations (multi-state remote, traveling employees, etc.) in section 12.

4. Ownership & Responsible Parties

List owners with 25%+ interest, plus all officers/managing members. SSN, DOB, and home address are required by most states.

Owner / Officer #1

Full legal name		Title / Role	% Ownership	SSN or ITIN	
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
Date of birth	Home street address		City	St	ZIP
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal phone	Personal email	Driver's license # & state (if state requires)			
<input type="text"/>	<input type="text"/>	<input type="text"/>			

Owner / Officer #2

Full legal name		Title / Role	% Ownership	SSN or ITIN	
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
Date of birth	Home street address		City	St	ZIP
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal phone	Personal email	Driver's license # & state (if state requires)			
<input type="text"/>	<input type="text"/>	<input type="text"/>			

Owner / Officer #3

Full legal name		Title / Role	% Ownership	SSN or ITIN	
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
Date of birth	Home street address		City	St	ZIP
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal phone	Personal email	Driver's license # & state (if state requires)			
<input type="text"/>	<input type="text"/>	<input type="text"/>			

Owner / Officer #4

Full legal name		Title / Role	% Ownership	SSN or ITIN	
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
Date of birth	Home street address		City	St	ZIP
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal phone	Personal email	Driver's license # & state (if state requires)			
<input type="text"/>	<input type="text"/>	<input type="text"/>			

5. Registered Agent in Each Registration State

Only required in states where you are not domiciled. List the in-state agent appointed for service of process.

Registered agent (individual or company name)	Phone	Email	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Street address	City	St	ZIP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Payroll & Employment Details

Date first employee hired	Date first wages will be paid	Pay frequency (Weekly, Bi-weekly, Semi-monthly, Monthly)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
# of full-time employees (est)	# of part-time employees (est)	# of seasonal employees (est)	# of 1099 contractors
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Estimated gross wages, first quarter (\$)	Estimated annual gross wages (\$)	Highest individual annual wage (est \$)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Some states require predecessor wage history within the same calendar year — see Section 8.

7. Worksite & Local Tax Locations

List every physical worksite. Required for local jurisdiction tax (PA EIT/LST, OH municipal, IN county, NY/NYC, KY locals, etc.) and for state UC

Worksite #1

Street address	City	St	ZIP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
County	Municipality / Township / Borough (PA, OH, KY, IN, etc.)	School district (PA, OH, KY, IA, etc.)	# of employees at this site
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Worksite #2

Street address	City	St	ZIP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
County	Municipality / Township / Borough (PA, OH, KY, IN, etc.)	School district (PA, OH, KY, IA, etc.)	# of employees at this site
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Worksite #3

Street address	City	St	ZIP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
County	Municipality / Township / Borough (PA, OH, KY, IN, etc.)	School district (PA, OH, KY, IA, etc.)	# of employees at this site
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Worksite #4

Street address	City	St	ZIP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
County	Municipality / Township / Borough (PA, OH, KY, IN, etc.)	School district (PA, OH, KY, IA, etc.)	# of employees at this site
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

8. Predecessor Employer / Acquired Business

Required if you acquired an existing business or any portion of one. May allow rate transfer for unemployment.

Acquired all or part of an existing business? (Yes/No) Date of acquisition Acquisition type (Full / Partial / Asset / Stock / Merger)

Predecessor legal name Predecessor FEIN Predecessor state withholding acct #

Predecessor state UC/SUI acct # Predecessor SUI rate (%) Transfer UC rate? (Yes/No/Required by law)

Notes on the acquisition (employees retained, payroll already run YTD under predecessor, etc.)

9. State & Local Income Tax Withholding

- Withhold state income tax
- PA Earned Income Tax (EIT)
- NY State + NYC/Yonkers
- MI city income tax
- Withhold local / municipal tax
- PA Local Services Tax (LST)
- IN county tax (CAGIT/COIT)
- MD county piggyback
- Withhold school district tax (PA/OH/etc.)
- OH city/municipal (RITA/CCA/other)
- KY occupational license
- Other local (specify in notes)

Preferred withholding filing frequency (if known: monthly / quarterly / etc.) Reciprocal-agreement states impacting employees (list)

10. State Unemployment (SUI/UC) Specifics

- Liable for SUI (general employer)
- 501(c)(3) electing contributory method
- Household / domestic – meets state threshold
- Voluntarily electing coverage
- Government / public employer
- Employees work in more than one state
- 501(c)(3) electing reimbursable method
- Agricultural – meets state ag threshold
- Excluding corporate officers (where allowed)

First taxable quarter (e.g. Q3 2026) YTD payroll under current entity (\$) Workers' comp carrier

Have you held UI accounts in other states in the past 3 years? If yes, list state(s) and account number(s).

11. Banking for State Tax / UC Payments (ACH Debit)

Many states require an enrolled bank account for EFT payment of withholding and UC. Provide once — we will not share beyond the registration process.

Bank name Account type (Checking / Savings) Account nickname (e.g. Operating, Payroll)

Routing number (9 digits) Account number Authorized signer on account

If you prefer not to enter bank info here, leave blank and provide a voided check via secure portal.

12. Notes & Special Circumstances

Remote workers, traveling employees, seasonal patterns, anticipated layoffs/closures, or anything else that affects registrations:

13. Third-Party Authorization (Power of Attorney)

Authorize Exact Payroll to register, file, and remit on the company's behalf for the agencies you have indicated above.

Agencies / account types covered by this authorization (default: all withholding, UC/SUI, and related local tax accounts in states checked above)

Signatory full name (must be owner / officer / authorized agent)

Title

Date

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Signature (type full legal name; you will also need to apply a wet/electronic signature on state-specific POA forms)

14. Internal Review & Sign-off (Exact Payroll Use Only)

- | | | |
|---|---|---|
| <input type="checkbox"/> ID & FEIN verified | <input type="checkbox"/> Secretary of State filing verified | <input type="checkbox"/> NAICS appropriate for industry |
| <input type="checkbox"/> All owner SSNs collected | <input type="checkbox"/> Worksites & local taxes captured | <input type="checkbox"/> Successor / predecessor reviewed |
| <input type="checkbox"/> Banking info captured or pending | <input type="checkbox"/> POA signed | <input type="checkbox"/> Ready for state filings |

Reviewer name

Title

Review date

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Open follow-ups before submitting:

Quick Reference: Common State-Specific Items

Make sure section 7/9 covers these items for any state you checked in section 3.

PA	EIT (resident & non-resident), LST, school district, PSD codes per worksite, UC employee withholding.
OH	Municipal income tax (RITA/CCA/Cleveland CCA/self-collecting cities), school district tax, JEDD/JEDZ.
NY	NYS withholding + NYC/Yonkers, MTA payroll tax (MCTMT) for downstate counties.
KY	City/county occupational license (e.g. Louisville Metro, Lexington-Fayette, Boone County).
IN	County income tax (CAGIT/COIT) based on Jan 1 county of residence and work.
MI	Michigan city income tax (24 cities) – resident vs. nonresident rates.
MD	County piggyback rate set on Form MW507; varies by county of residence.
CA	EDD combined registration (DE-1) covers PIT withholding, UI, ETT, and SDI.
NJ	Combined NJ-REG covers withholding, UI/DI/FLI, and disability insurance.
OR	Combined Employer Registration + statewide transit + Lane/TriMet/Portland Metro/Multnomah.
WA	L&I workers' comp (state-run) and Paycheck WA Cares premium in addition to UI.
PFML states	CT/MA/CO/DE/ME/MN/NY/OR/WA: Paid Family/Medical Leave program registration may be separate from UC.
Successors	All states: predecessor FEIN, account #s, acquisition date, and YTD wage history may be required to transfer experience rate.