

Current Client ID

Legal Name

Contact Name

Phone Number

Ext.

Email Address

New FEIN Information

! New FEIN (Validation required)

New Company Name (If applicable)

Estimated first check date

1. Do wages need to be transferred from the previous FEIN?

☐ Yes ☐ No If **Yes**: Retroactively to what date?

There are fees assessed with moving wages

2. Are pay periods and check dates the same as your previous FEIN?

☐ Yes ☐ No If **No**: Complete the [Schedule Adjustment Form](#)

3. Will you be using the same state, local, and unemployment tax ID's?

☐ Yes ☐ No If **No**: Please list the state and the corresponding ID
If you do not have the ID please list "applied for" & date

There are fees assessed for missing Tax ID's

State	Withholding ID	State	Unemployment ID	State	Local ID

4. Will you be using the same bank account(s) associated with your previous FEIN?

☐ Yes ☐ No If **Yes**: Confirm your bank account

If **No**: Complete the [Client Bank Change Form](#)

Last 4 of Account #

5. Do any employees need to be added/removed?

☐ Yes ☐ No

If **Removing Employees**: List the employee(s) here:

If **Adding Employees** - Complete the [Employee Setup & Maintenance Form](#) OR ask your payroll specialist / support team for alternative options

6. Are you adding any products or services?

☐ Yes ☐ No

If **Yes** - List them here:

All required set up fees for ancillary products will be charged based on the payroll agreement signed

FEIN Change: Details



You must send the IRS documentation showing the new FEIN is approved (IRS Form SS-4). We cannot begin the change process without the IRS validation. Failure to provide documentation timely can result in delays with setup and additional fees if wages need to be moved from your old FEIN.

Retroactive Wage Changes & Fees: A \$25.00 fee per check date will be assessed for any current quarter check(s) needing to be transferred to the new FEIN. Adjusting a prior quarter will result in a fee of \$250.00 per quarter with the potential for additional charges if W2's are impacted. Adjusting a prior check date or prior quarter, as requested, may result in additional tax payments due and the amending of previously filed employment tax returns. Heartland Payroll will not be responsible for any penalty and interest assessed due to the processing, filing, and/or depositing any tax liability (federal, state, or local) associated with the adjustment listed. Any associated penalty and/or interest assessed by the tax agencies will be your responsibility.

State/Local Tax ID's: Certain states will not allow third parties to pay your taxes and file your returns if we do not have your state or local withholding ID. In that situation, you will have to pay and file the taxes until you receive a withholding ID. If you have recently applied for a new ID, please send the documentation to your Payroll Specialist or Payroll Team for compliance purposes. If you will no longer be using your previous state or local withholding IDs, you will need to notify the agencies to close the accounts. Otherwise, the agency will be expecting returns to be filed on your assigned filing frequency. Heartland cannot advise if new IDs are required for your new FEIN, please check with your CPA or accountant.

Unemployment Tax ID's: If you are applying for a new ID, the new employer tax rate or your current tax rate will be used, whichever is higher, to ensure proper payment of your taxes. Until the ID and rate for the new FEIN, the ID will be left blank and we will use the current rate or the new business rate, whichever is higher, for the new account until the information is received. If you will no longer be using your old SUI ID, you will notify the agency to close that account. Otherwise, the agency will be expecting returns to be filed quarterly.

Compliance Fees for Missing Tax ID's: Tax IDs are needed to file returns, pay liabilities, and avoid penalties for missing returns/info. We request essential compliance information to ensure that all accounts are complete and aligned with federal and state requirements, allowing us to provide our clients with excellent service. A \$60.00 fee will be assessed for missing federal, state, and local tax ID's each month they are missing. A 30 day grace period applies to each compliance fee for new clients. NY, MD, PA, and AL SUI will have an extended grace period of 60 days due to the agency's turnaround time for registration.

Forms & Resources

[Schedule Adjustment Form](#) - Complete if utilizing a different payroll processing schedule for new FEIN

[Client Bank Change Form](#) - Complete if using a different payroll bank account for new FEIN

[Employee Setup & Maintenance Form](#) - Complete if adding employees to your new FEIN or ask your payroll specialist / support team for alternative options

[IRS FEIN Change Confirmation](#) - For more information on what to provide Heartland for proof of change