

DOCUMENT NAME	<b>REQUIRED / OPTIONAL</b>
Employer of Record Form	Required
Form SS-4: Application for Employer Identification Number	Required
Form 2678: Employer/Payer Appointment of Agent	Required
Form 8821: Tax Information Authorization	Required
Form UIT-1146A FORFF: Limited Power of Attorney	Required
Form 821-PSC: Withholding Tax Payroll Service Company Authorization	Required
Background Check Disclosure	Required

## NOTE:

Please ensure all REQUIRED documents are filled out accurately before submitting them for processing.



# VETERANS INDEPENDENCE PLUS OF SOUTHERN ARIZONA EMPLOYER OF RECORD FORM

**Instructions:** Please fill out any information in Sections 1 and 2, where applicable. Veterans are required to sign and date at the bottom of the form. If a Veteran has an Employer of Record, the EOR must also sign and date the form. Please submit the completed form to PremierFMS via one of the following options:

<b>Mail</b> 10425 W North Ave Suite 345 Milwaukee, WI 53226	<b>Email</b> PremierEnrollme	nt@Premier-FMS.com	
SECTION 1: VETERAN'S INF	ORMATION		
First Name:	Middle Initial:	Last Name:	
Mailing Address:	City:	State:	Zip:
Home #: M	obile #:	Work #:	
Email Address:		Gender:	
Date of Birth: / //	Social Security N	lumber:	
SECTION 2: EMPLOYER OF	RECORD'S INFO	RMATION (If applicabl	e)
First Name:	Middle Initial:	Last Name:	
Mailing Address:	City:	State:	Zip:
Home #: M	obile #:	Work #:	
Email Address:			
Date of Birth: / /	Social Security N	lumber:	
By signing below, you certify that the documentation that may be needed		•	ou have all supporting
Print Name (Veteran):			
Veteran Signature:		Date:	//
Print Name (Authorized Representati	ve):		
Authorized Representative Signature	:	Date:	//
Print Name (Employer of Record):			

10425 W North Ave, Suite 345, Milwaukee, WI 53226 | Phone: 855.538.7776 | Fax: 855.533.3076 | AZVSDP@Premier-FMS.com | www.Premier-FMS.com

Employer of Record Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Form SS-4
(Rev. December 2023)
Department of the Treasury Internal Revenue Service

Application for Employer Identification Number (For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.) See separate instructions for each line. Keep a copy for your records. Go to www.irs.gov/FormSS4 for instructions and the latest information.

OMB No. 1545-0003

EIN

1	Legal name	of entity (c	r individu	al) for whom	n the EIN	is being requested	

early.	2	Trade name of business (if different from name on line 1)	3	Executor, administrator, trustee, "care of" name		
int cle	4a	Mailing address (room, apt., suite no. and street, or P.O. bo	apt., suite no. and street, or P.O. box) <b>5a</b> Street address (if different) (D			
Type or print clearly.	4bCity, state, and ZIP code (if foreign, see instructions)5bCity		City, state, and ZIP code (if foreign, see instructions)			
<b>Lype</b>	6 County and state where principal business is located					
•	7a I	Name of responsible party		7b SSN, ITIN, or EIN		
8a		s application for a limited liability company (LLC) foreign equivalent)?	□ n	8bIf 8a is "Yes," enter the number of LLC members		
8c		s "Yes," was the LLC organized in the United States? .		· · · · · · · · · · · · · · · · · · ·	🗌 No	
9a	Туре	of entity (check only one box). Caution: If 8a is "Yes," see				
	_	Sole proprietor (SSN)		Estate (SSN of decedent)		
	_	Partnership		Plan administrator (TIN)		
		Corporation (enter form number to be filed)		Trust (TIN of grantor)		
	_	Personal service corporation		Military/National Guard State/local governm	ent	
	_	Church or church-controlled organization		☐ Farmers' cooperative ☐ Federal government		
		Other nonprofit organization (specify)		REMIC Indian tribal government		
	_	Dther (specify)		Group Exemption Number (GEN) if any	nis/enterprises	
9b		propertion, name the state or foreign country (if Sta	to	Foreign country		
90		cable) where incorporated	ue	Toteign country		
10			Banking	j purpose (specify purpose)		
		Started new business (specify type)		d type of organization (specify new type)		
	_		-	sed going business		
				a trust (specify type)		
		Created a pension plan (specify type)				
	_	Dther (specify)				
11		business started or acquired (month, day, year). See instruct	tions.	12 Closing month of accounting year		
				14 Reserved for future use		
13	Highe	st number of employees expected in the next 12 months (enter	-0- if no	ne).		
		Agricultural Household Othe	r			
15	First	date wages or annuities were paid (month, day, year).	ote: If a	pplicant is a withholding agent, enter date income will fi	st be paid to	
		esident alien (month, day, year)			·	
16		k one box that best describes the principal activity of your bus		Health care & social assistance Wholesale-agent/	oroker	
		Construction 🗌 Rental & leasing 🔲 Transportation & wareh	ousing	Accommodation & food service Wholesale-other	Retail	
	🗌 F	Real estate 🛛 Manufacturing 🗌 Finance & insurance	•	Other (specify)		
17	Indic	ate principal line of merchandise sold, specific construction	work do	ne, products produced, or services provided.		
18	Has t	he applicant entity shown on line 1 ever applied for and rec	eived ar	EIN? Yes No		
		s," write previous EIN here	on ou u			
		· · ·	ndividual	to receive the entity's EIN and answer questions about the complet	ion of this form.	
Thi	rd	Designee's name		Designee's telephone number (ir		
Par						
Des	signee	Address and ZIP code		Designee's fax number (inclu	ide area code)	
Unde	r penalties	of perjury, I declare that I have examined this application, and to the best of my	nowledae	and belief, it is true, correct, and complete. Applicant's telephone number (ii	nclude area code	
		le (type or print clearly)				
				Applicant's fax number (incl	ude area code)	
Sign	ature			Date		
For	Privac	Act and Paperwork Reduction Act Notice, see separat	e instru	ctions. Cat. No. 16055N Form SS-4	(Rev. 12-2023)	

# Do I Need an EIN?

File Form SS-4 if the applicant entity doesn't already have an EIN but is required to show an EIN on any return, statement, or other document.<sup>1</sup> See also the separate instructions for each line on Form SS-4.

IF the applicant	AND	THEN
started a new business	doesn't currently have (nor expect to have) employees	complete lines 1, 2, 4a–8a, 8b–c (if applicable), 9a, 9b (if applicable), 10–13, and 16–18.
hired (or will hire) employees, including household employees	doesn't already have an EIN	complete lines 1, 2, 4a–6, 7a–b, 8a, 8b–c (if applicable), 9a, 9b (if applicable), and 10–18.
opened a bank account	needs an EIN for banking purposes only	complete lines 1–5b, 7a–b, 8a, 8b–c (if applicable), 9a, 9b (if applicable), 10, and 18.
changed type of organization	either the legal character of the organization or its ownership changed (for example, you incorporate a sole proprietorship or form a partnership) <sup>2</sup>	complete lines 1–18 (as applicable).
purchased a going business <sup>3</sup>	doesn't already have an EIN	complete lines 1–18 (as applicable).
created a trust	the trust is other than a grantor trust or an IRA trust <sup>4</sup>	complete lines 1–18 (as applicable).
created a pension plan as a plan administrator <sup>5</sup>	needs an EIN for reporting purposes	complete lines 1, 3, 4a-5b, 7a-b, 9a, 10, and 18.
is a foreign person needing an EIN to comply with IRS withholding regulations	needs an EIN to complete a Form W-8 (other than Form W-8ECI), avoid withholding on portfolio assets, or claim tax treaty benefits <sup>6</sup>	complete lines 1–5b, 7a–b (SSN or ITIN as applicable), 8a, 8b–c (if applicable), 9a, 9b (if applicable), 10, and 18.
is administering an estate	needs an EIN to report estate income on Form 1041	complete lines 1–7b, 9a, 10–12, 13–17 (if applicable), and 18.
is a withholding agent for taxes on nonwage income paid to an alien (that is, individual, corporation, or partnership, etc.)	is an agent, broker, fiduciary, manager, tenant, or spouse who is required to file Form 1042, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	complete lines 1, 2, 3 (if applicable), 4a–5b, 7a–b, 8a, 8b–c (if applicable), 9a, 9b (if applicable), 10, and 18.
is a state or local agency	serves as a tax reporting agent for public assistance recipients under Rev. Proc. 80-4, 1980-1 C.B. 581 <sup>7</sup>	complete lines 1, 2, 4a-5b, 7a-b, 9a, 10, and 18.
is a single-member LLC (or similar single-member entity)	needs an EIN to file Form 8832, Entity Classification Election, for filing employment tax returns and excise tax returns, or for state reporting purposes <sup>8</sup> , or is a foreign-owned U.S. disregarded entity and needs an EIN to file Form 5472, Information Return of a 25% Foreign-Owned U.S. Corporation or a Foreign Corporation Engaged in a U.S. Trade or Business	complete lines 1–18 (as applicable).
is an S corporation	needs an EIN to file Form 2553, Election by a Small Business Corporation <sup>9</sup>	complete lines 1-18 (as applicable).

- <sup>1</sup> For example, a sole proprietorship or self-employed farmer who establishes a qualified retirement plan, or is required to file excise, employment, alcohol, tobacco, or firearms returns, must have an EIN. A partnership, corporation, REMIC (real estate mortgage investment conduit), nonprofit organization (church, club, etc.), or farmers' cooperative must use an EIN for any tax-related purpose even if the entity doesn't have employees.
- <sup>2</sup> However, don't apply for a new EIN if the existing entity only (a) changed its business name, (b) elected on Form 8832 to change the way it is taxed (or is covered by the default rules), or (c) terminated its partnership status because at least 50% of the total interests in partnership capital and profits were sold or exchanged within a 12-month period. The EIN of the terminated partnership should continue to be used. See Regulations section 301.6109-1(d)(2)(iii).
- <sup>3</sup> Don't use the EIN of the prior business unless you became the "owner" of a corporation by acquiring its stock.
- <sup>4</sup> However, grantor trusts that don't file using Optional Method 1 and IRA trusts that are required to file Form 990-T, Exempt Organization Business Income Tax Return, must have an EIN. For more information on grantor trusts, see the Instructions for Form 1041.
- <sup>5</sup> A plan administrator is the person or group of persons specified as the administrator by the instrument under which the plan is operated.
- <sup>6</sup> Entities applying to be a Qualified Intermediary (QI) need a QI-EIN even if they already have an EIN. See Rev. Proc. 2000-12.
- <sup>7</sup> See also Household employer agent in the instructions. Note: State or local agencies may need an EIN for other reasons, for example, hired employees.
- <sup>8</sup> See Disregarded entities in the instructions for details on completing Form SS-4 for an LLC.
- <sup>9</sup> An existing corporation that is electing or revoking S corporation status should use its previously assigned EIN.

Form	2678 Employer/Payer Appoint	ment of Agent		
(Rev.	August 2014) Department of the Treasury - Internal Revenue S	ervice		OMB No. 1545-0748
dep	this form if you want to request approval to h osits or payments of employment or other w ke an existing appointment.	•		
a	you are an employer or payer who wants to n nd 2 and sign Part 2. Then give it to the agent. I gn it.			
fo	ote. This appointment is not effective until we appropriate filing Form 2678 on page 3.			
	you are an employer, payer, or agent who wants mplete all three parts. In this case, only one sign		,	
Pa	rt 1: Why you are filing this form			
Ù	eck one) /ou want to <b>appoint</b> an agent for tax reporting, dep /ou want to <b>revoke</b> an existing appointment.	positing, and paying.		
Pa	rt 2: Employer or Payer Information: Complet	e this part if you want to appoint an	agent or revoke a	n appointment.
1	Employer identification number (EIN)			
2	Employer's or payer's name (not your trade name)			
3	Trade name (if any)			
4	Address			
		Number Street		Suite or room number
		City	State	ZIP code
		Foreign country name Foreign p	rovince/county	Foreign postal code
5	Forms for which you want to appoint an agent appointment to file. (Check all that apply.)	•	For ALL employees/ bayees/payments	For SOME employees/ payees/payments
	Form 940, 940-PR (Employer's Annual Federal Un			
	Form 941, 941-PR, 941-SS (Employer's QUARTE	,		
	Form 943, 943-PR (Employer's Annual Federal Tax Form 944, 944(SP) (Employer's ANNUAL Federal			
	Form 945 (Annual Return of Withheld Federal Inco	,		
	Form CT-1 (Employer's Annual Railroad Retireme			
	Form CT-2 (Employee Representative's Quarterly	Railroad Tax Return)		
	*Generally you cannot appoint an agent to repo Unemployment (FUTA) Tax Return, unless you ar		n Form 940, Emplo	oyer's Annual Federal
	Check here if you are a home care service re tax for you. See the instructions.	ecipient, and you want to appoint the a	agent to report, depo	osit, and pay FUTA
	I am authorizing the IRS to disclose otherwise cor			
	appointment, including disclosures required to pro reporting agent or certified public accountant, to p			
	deposits and payments. Such contract may author			
	agent to such third party. If a third party fails to file payer remain liable.			

Sign your			Print your name	e here	
X Sign your name here			Print your title h	nere	
Date	/ /		Best daytime p		
			Now	give this form to the	agent to complete.
For Privacy Act and Paperwor	k Reduction Act Notice. see	the instructions.	IRS.gov/form2678	Cat. No. 18770D	Form 2678 (Rev. 8-2014)

Form <b>8821</b>				
(Rev. January 2021)				
Department of the Treasury Internal Revenue Service				

# **Tax Information Authorization**

Go to www.irs.gov/Form8821 for instructions and the latest information.
Don't sign this form unless all applicable lines have been completed.
Don't use Form 8821 to request copies of your tax returns or to authorize someone to represent you. See instructions.

#### 1 Taxpayer information. Taxpayer must sign and date this form on line 6.

Taxpayer name and address	Taxpayer identification number(s)		
	Daytime telephone number Plan number (if applicable)		
2 Designee(s). If you wish to name more than two designees, atta designees is attached ► □	h a list to this form. Check here if a list of additional		
Name and address	CAF No.		

Name and address		CAF No.		
		PTIN		
		Telephone No.		
		Fax No.		
Check if to be sent copies of notices and communications		Check if new: Address 🗌 Telephone No. 🗌 Fax No. 🗌		
Name and address		CAF No.		
		PTIN		
		Telephone No.		
		Fax No.		
Check if to be sent copies of notices and communications		Check if new: Address 🗌 Telephone No. 🗌 Fax No. 🗌		

**3** Tax information. Each designee is authorized to inspect and/or receive confidential tax information for the type of tax, forms, periods, and specific matters you list below. See the line 3 instructions.

D By checking here, I authorize access to my IRS records via an Intermediate Service Provider.

(a)	<b>(b)</b> Tax Form Number	<b>(c)</b> Year(s) or Period(s)	<b>(d)</b> Specific Tax Matters
Type of Tax Information (Income, Employment, Payroll, Excise, Estate, Gift, Civil Penalty, Sec. 4980H Payments, etc.)	(1040, 941, 720, etc.)		

4 Specific use not recorded on the Centralized Authorization File (CAF). If the tax information authorization is for a specific use not recorded on CAF, check this box. See the instructions. If you check this box, skip line 5 . . . . . . ▶ □

- 6 Taxpayer signature. If signed by a corporate officer, partner, guardian, partnership representative (or designated individual, if applicable), executor, receiver, administrator, trustee, or individual other than the taxpayer, I certify that I have the legal authority to execute this form with respect to the tax matters and tax periods shown on line 3 above.

#### ▶ IF NOT COMPLETED, SIGNED, AND DATED, THIS TAX INFORMATION AUTHORIZATION WILL BE RETURNED.

#### ► DON'T SIGN THIS FORM IF IT IS BLANK OR INCOMPLETE.

Signature

Date

Print Name

Title (if applicable)

### ARIZONA DEPARTMENT OF ECONOMIC SECURITY Employer Engagement Administration

## LIMITED POWER OF ATTORNEY

The Limited Power of Attorney form is used by employers to authorize a third party to represent them before the Arizona Department of Economic Security (DES) in the Unemployment Insurance (UI) matters specified on the form. Such authorization also permits DES to provide the representative with any confidential information concerning the employer's Arizona UI account that is related to those matters.

Specify which matters the authorization applies to by checking the appropriate checkbox(es) on the form. If you want the authorization limited to a specific matter, such as a specific DES decision under appeal, check the "Other, specific UI matter" checkbox and briefly describe the matter in the space below to identify it specifically. Provide the representative's address immediately below that if you want to have all correspondence related to the "Other, specific UI matter" mailed to that address.

If you want to change the primary mailing address for general DES correspondence related to the employer's UI account, complete the area of the form provided for that purpose. You may also specify a separate mailing address for unemployment benefit claim-related notices by completing the area of the form provided for that purpose. Such a separate address is sometimes advisable, to enable the timely protesting of claims. Protests must be returned or postmarked within 10 business days after the date on the claim filing notice (Notice to Employer – UB-110) to be considered timely.

Submit the completed form with the original signature of a duly qualified officer or owner of the employer's business to the UI Tax Employer Registration Unit at the address below. Questions about the use or completion of the form should also be directed to the Employer Registration Unit.

ADES - UI Tax Section Employer Registration Unit P.O. Box 6028 - Mail Drop 5881 Phoenix, Arizona 85005-6028 Telephone – (602) 771-6602 Fax – (602) 532-5539 Email – <u>UITStatusClerical@azdes.gov</u>

Equal Opportunity Employer/Program • Under Titles VI and VII of the Civil Rights Act of 1964 (Title VI & VII), and the Americans with Disabilities Act of 1990 (ADA), Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, and Title II of the Genetic Information Nondiscrimination Act (GINA) of 2008; the Department prohibits discrimination in admissions, programs, services, activities, or employment based on race, color, religion, sex, national origin, age, disability, genetics and retaliation. The Department must make a reasonable accommodation to allow a person with a disability to take part in a program, service, or activity. Auxiliary aids and services are available upon request to individuals with disabilities. To request this document in alternative format or for further information about this policy, Contact the UI Tax Office at 602-771-6606; TTY/TDD Services: 7-1-1. • Free language assistance for DES services is available upon request. • Disponible en español en línea o en la oficina local.

## ARIZONA DEPARTMENT OF ECONOMIC SECURITY Employer Engagement Administration P.O. BOX 6028, Mail Drop 5881, Phoenix, AZ 85005-6028

## LIMITED POWER OF ATTORNEY

## **EMPLOYER INFORMATION**

EMPLOYER NAME		ARIZONA UI ACCOUNT NO. OR FEDERAL EIN				
Hereby appoints						
Premier FMS		855-224-5810				
(Representative Company's Name)		(Representative Company's Phone No.)				
To represent said employer before Unemployment Insurance (UI) spe		of Economic Security (DES) in all matters related to Arizona notice (check all boxes that apply):				
🗹 UI tax preparati	✓ UI tax preparation/filing including filing/paying via the Internet Tax and Wage System (TWS)					
🗌 All other genera	I UI matters (all benefit cla	aim protests, all appeals of agency determinations, etc.)				
Other, specific UI matter (provide details below to identify the matter or no action will be t						
Provide representative's address i	f you want mail concernin	g the "Other, specific UI matter" sent there:				
REPRESENTATIVES COMPANY'S ADDR	ESS (P.O. Box/Street No., Stree	t, City, State, ZIP)				
Premier FMS 10425 W North Ave, St	te 345, Milwaukee, WI 5322	5				
COMPLETE THIS AREA ONLY	IF YOU WANT TO CHAN	GE THE EMPLOYER'S PRIMARY MAILING ADDRESS				
EMPLOYER NAME		PHONE NO.				
ADDRESS (P.O./Street No. Street	, City, State, ZIP)					
*All general UI correspondence includ	ing liability determinations, ta	ax and wage report forms, tax assessments, and notices of tax rates,				
	-	<b>PRIMARY</b> address. If you want a <b>SEPARATE</b> mailing address for				
	-	and claim appeals, complete the address area below.				
OPTIONAL SEPARATE MAILIN	G ADDRESS FOR UNEM	PLOYMENT BENEFIT CLAIM-RELATED NOTICES				
EMPLOYER NAME		PHONE NO.				
ADDRESS (P.O./Street No. Street	, City, State, ZIP)					
In witness whereof, said employer has	caused this instrument to be a	attested by the signature of a duly qualified officer or owner this day of				
(Day)	(Month)	(Year)				
This Limited Power of Attorney author remains in effect until revoked in writir		sedes all prior authorizations related to the specified matters and he representative				
PRINT NAME (First, M.I, Last) TITLE						
		Employer				
SIGNATURE						
FOR AGENCY USE ONLY						

REVISED PRIMARY ADDRESS REVISED/ADDED CLAIMS ADDRESS

NOTES

INITIALS

DATE

## Arizona Form 821-PSC

Withholding Tax Payroll Service Company Authorization

		nust sign and da	ate this form i	n Section 6.			
Ia	xpayer Name	ame Employer Identification Number (EIN)			tification Number (EIN)		
Ad	Address (Number and street or PO Box)				Daytime Phone Number (with area code)		
Cit	ty				State	ZIP Code	
	Appointee Information					•	
Na	ame				Identification N	umber	
Ad	dress (Number and street or PO Box)	3ox)			Phone Number (with area code)		
Cit	ty	State	ZIP Code		Fax Number (w	vith area code)	
3.	State Authorization	•	•				
	Arizona Department of Revenue (department). Appointee is also hereby authorized to discuss taxpayer's otherwise confidential withholding tax information with authorized department employees. This authorization includes all department withholding tax returns and shall begin with the tax period $[M, M, D, D, Y, Y, Y]$ and shall remain in effect through all subsequent periods until four years after the date received, revoked by taxpayer, or terminated by appointee, whichever occurs first.						
4.	Retention/Revocation of Authoriza	ation					
	you do not want to revoke a prior authorization						
5.	Authorization Agreement						
	Taxpayer understands that this authorization of that all deposits and payments are made.	loes not relieve taxp	bayer of the resp	onsibility to ens	ure that all with	holding tax returns are filed and	
6.	Signature of or for Taxpayer						
	I hereby certify that the director of the Arizona in department files concerning the undersign for releasing such withholding tax informatio authority, within the meaning of A.R.S. §42-20 company(ies), trust(s), estate(s), partnership fraudulent or false is a Class 5 felony pursuan By checking this box and signing below I am a principal officer; as defined in A.R.S.	ned taxpayer and re n to the appointee 03(A), to execute thi (s), and/or individua at to A.R.S. §42-1127 certify under penalty	elieve said direc specified by this is authorization o II(s). I understa 7(B)(2).	tor, or departm a authorization. on behalf of the a nd that to know	ent representat By signing this above-mentione ingly prepare o	tive, of any liability whatsoever s form, I certify that I have the ed corporation(s), limited liability or present a document which is	
If this withholding tax information authorization is not signed and dated, it will be returned.						be returned.	
	Print Name		— Ē	Print Name			
	Signature			Signature			

Date

Date



# VETERAN INDEPENCDENCE PLUS OF SOUTHERN ARIZONA BACKGROUND CHECK DISCLOSURE

Premier Financial Management Services (PremierFMS) is required, as part of the Veteran Independence Plus Veteran Directed Care program, to conduct a background check before authorized representatives are eligible to begin serving as an authorized representative/employer for a Veteran. PremierFMS will be running a background check. Successfully passing the background check is a condition of representing the Veteran.

First Name:	Middle Initial:	Last Name:		
Maiden Name or Alias (if applicable):		Date of Birth:	//	

## **AUTHORIZATION**

By signing below, I certify that the information provided above is accurate. I authorize PremierFMS to conduct a background check. Furthermore, I understand that the results of the background checks will be shared with the Arizona State Veteran Directed Care Program Coordinator and Veteran/Authorized Representative.

Signature:	Date:	//	

For any questions or concerns, please contact our office at 855.538.7776. Please submit the completed form to PremierFMS via one of the following options:

Mail 10425 W North Ave Suite 345 Milwaukee, WI 53226 Email PremierEnrollment@Premier-FMS.com