



SECTION ONE CLIENT DETAILS

Legal corporate name: \_\_\_\_\_

Doing business as (DBA): \_\_\_\_\_

Corporate address: \_\_\_\_\_

Address two: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

SECTION TWO GENERAL BACKGROUND DETAILS

Type of organization:  Corporation  Partnership  LLC  Sole Proprietorship  Government Entity

Unemployment status:  Merit-Rated(for Profit)  Merit Rated(non-profit)  Reimbursing(non-profit)  Reimbursing(Government)

Number of active federal identification numbers (FEINS): \_\_\_\_\_ Number of active state unemployment accounts: \_\_\_\_\_

Current estimate number of employees: \_\_\_\_\_ Estimated turnover %: \_\_\_\_\_

States of operation: \_\_\_\_\_

Estimated number of claims past three years: Year 1 \_\_\_\_\_ Estimated number of hearings: Year 1 \_\_\_\_\_

Year 2 \_\_\_\_\_ Year 2 \_\_\_\_\_

Year 3 \_\_\_\_\_ Year 3 \_\_\_\_\_

General industry type: \_\_\_\_\_

SECTION THREE NEW CLIENT/PROSPECT SERVICE INFORMATION

Do you currently outsource your unemployment claims management:  Yes  No

If yes, name of current provider: \_\_\_\_\_

Reason for change/search for new provider: \_\_\_\_\_

Service(s) selected/of interest:  Unemployment Cost Management  Employment/Income Verification

Additional related services requested: \_\_\_\_\_

Service level requested:  Full (standard) service (includes claims management/hearing representation/tax management)

Service without hearing representation (claims management/tax management only)

Claims management and hearing representation only (no tax management)

SECTION FOUR CONTACT INFORMATION

Service contact preference:  One claims contact within organization  Multiple claims contacts within organization

Preferred method of contact:  Email  Telephone  Fax

Contact name: \_\_\_\_\_

Email address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

**Thank you for taking the time to complete this questionnaire. The information provided will assist us in setting a fair and competitive fee for our unemployment cost management services. If you have any questions, please do not hesitate to contact me.**