

COMPANY ACCOUNT REQUEST QUICK TIPS

8 TIPS TO AN APPROVAL



1) PROVIDE ACCURATE DOCUMENTS

Upload the appropriate Secretary of State (SOS) and Internal Revenue Service (IRS) documentation. The documents must be in a single PDF and must not exceed 8 MB. The system will not accept more than one PDF.

2) INFORMATION MUST MATCH

Make sure that the information in the request form matches exactly as it appears on the IRS and SOS Documents. Punctuation in the request must match to the SOS documentation.



3) USE THE EXACT LEGAL NAME

Companies should use the exact legal name as it appears on their legal documentation. Do not use any other trade name or “doing business as” (DBA).

4) ACCEPTABLE IRS DOCUMENTS

Only the SS-4 Letter, 147C letter, or Form 6166 are acceptable forms. To request a copy of the 147C letter from the IRS, contact the Business & Specialty Tax Line (800-829-4933). We can also accept a printout from the IRS website that provides the legal name and EIN.



5) ACCEPTABLE SOS DOCUMENTS

Examples of acceptable SOS documentation include, but are not limited to, articles of organization, certificate of existence, certificate of filing, articles of incorporation, certificate of good standing, etc.

6) SOLE PROPRIETORS SHOULD USE THEIR LEGAL NAME

Sole Proprietors should use their full legal name (last, first, full middle) as the company legal name.



7) SOLE PROPRIETORS SHOULD USE THEIR SSN CARD

The system will only allow a single PDF file to be uploaded. Combine all required documents into a single PDF file that does not exceed 8 MB.

8) ACCOUNT ADMINISTRATORS MUST BE DIRECT EMPLOYEES

If the company does not have direct employees, they must submit a LOE (letter of explanation) signed by an owner or executive officer that explains that the entity does not have direct employees and must list who is authorized to act as an administrator for the entity.

