

A XENDOO + GUSTO WEBINAR

Payroll Simplified!

KARLA'S SWEETS

works with

xendoo + gusto



Payroll 101

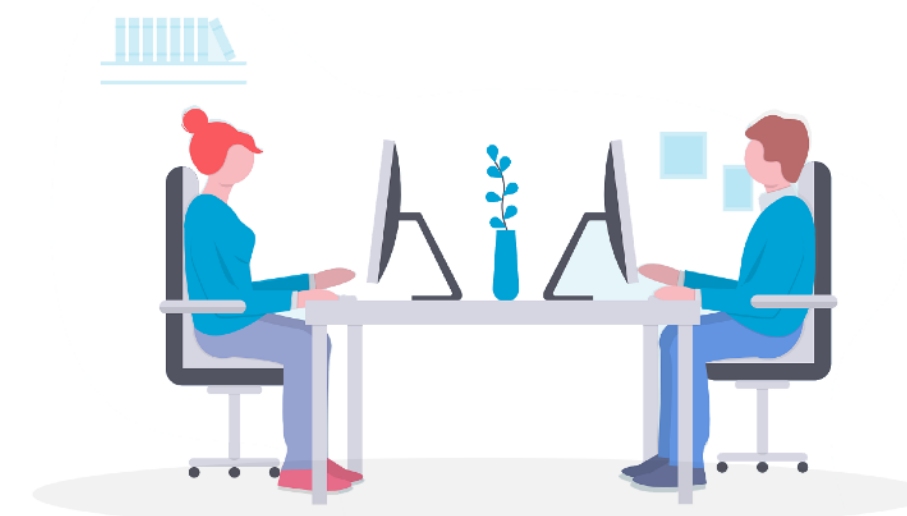
Employer



Solopreneur



Contractor



Payroll Simplified!

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About gusto

The right tools and services for your business and your team.



Full-service
Payroll



Medical,
dental, vision



Certified HR
experts



Time
tracking



Hiring and
onboarding



Employee
finance tools

Payroll Simplified!

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About xendoo

Your online bookkeeping and tax team.



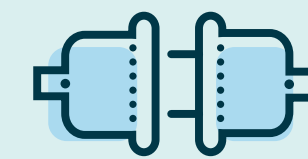
Monthly
bookkeeping



Tax
Savings



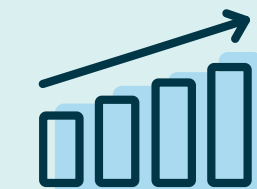
Catch up
service



Expert
integrations



Communication
your way



Accurate
financials

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Employer



- Full Service Payroll
- Medical, Dental, Vision
- Certified HR Experts
- Time tracking
- Hiring and Onboarding
- Employee Finance Tools

Solopreneur

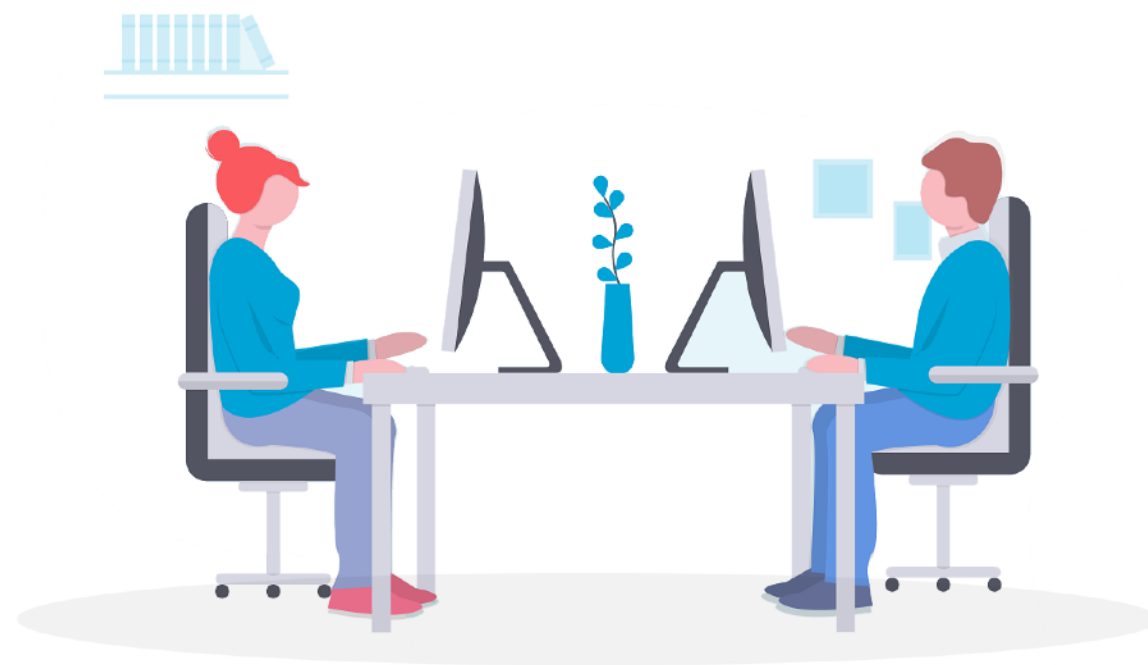


- If you're a sole prop, the IRS sees you as self-employed. As a result, you would most likely pay yourself through something called an owner's draw. A draw allows you to take money out of your business for personal use.

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Contractor



- Manage all your contractors online
- Contractors self-onboard online and get automatic payday emails
- Gusto automatically generates and files your 1099-MISC forms where required and emails them to all your contractors

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Form W-2

22222		a Employee's social security number		OMB No. 1545-0008	
b Employer identification number (EIN)		1 Wages, tips, other compensation		2 Federal income tax withheld	
c Employer's name, address, and ZIP code		3 Social security wages		4 Social security tax withheld	
		5 Medicare wages and tips		6 Medicare tax withheld	
		7 Social security tips		8 Allocated tips	
d Control number		9		10 Dependent care benefits	
e Employee's first name and initial Last name Suff.		11 Nonqualified plans		12a	
		13 Statutory employee Retirement plan Third-party sick pay		12b	
		14 Other		12c	
				12d	
f Employee's address and ZIP code					
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax

Annual report of wages, tips, and other compensation paid to an employee, as well as the employee's taxes withheld.

Form 1099

☐ VOID☐ CORRECTED

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Rents	OMB No. 1545-0115	
		\$	2021	
		2 Royalties	Form 1099-MISC	
		\$	3 Other income	4 Federal income tax withheld
		\$	\$	
		5 Fishing boat proceeds	6 Medical and health care payments	
PAYER'S TIN	RECIPIENT'S TIN	\$	\$	Miscellaneous Information
RECIPIENT'S name		7 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale <input type="checkbox"/>	8 Substitute payments in lieu of dividends or interest	
		9 Crop insurance proceeds	10 Gross proceeds paid to an attorney	
		11 Fish purchased for resale	12 Section 409A deferrals	
Street address (including apt. no.)		\$	\$	
City or town, state or province, country, and ZIP or foreign postal code		\$	\$	
Account number (see instructions)		13 Excess golden parachute payments	14 Nonqualified deferred compensation	
FATCA filing requirement <input type="checkbox"/>		\$	\$	
		15 State tax withheld	16 State/Payer's state no.	17 State income
		\$		\$
		\$		\$

Form 1099-MISC

www.irs.gov/Form1099MISC

Department of the Treasury - Internal Revenue Service

Annual report of payments made to an unincorporated business or independent contractor.

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Form W-9

Form

W-9

(Rev. October 2018)

Department of the Treasury

Internal Revenue Service

Request for Taxpayer

Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the requester. Do not send to the IRS.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Directed Trust Company FBO John Doe IRA

2 Business name/disregarded entity name, if different from above

ABC Investments, LLC

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☒ Individual/sole proprietor or single-member LLC

☐ C Corporation

☐ S Corporation

☐ Partnership

☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►

☐ Other (see instructions) ►

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) 1

Exemption from FATCA reporting code (if any)

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

123 LLC Mailing Address Way

6 City, state, and ZIP code

City, State, Zip

7 List account number(s) here (optional)

123456 (IRA account number, optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a*

Social security number

If you're an independent contractor or freelancer, you've likely filled out a W-9. If you've earned interest from a bank or dividends from a mutual fund, you've probably also encountered the W-9 form.

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Form 940

Form **940 for 2020:** Employer's Annual Federal Unemployment (FUTA) Tax Return

Department of the Treasury — Internal Revenue Service

850113

OMB No. 1545-0028

Employer identification number (EIN) -

Name (not your trade name)

Trade name (if any)

Address

Number
Street
Suite or room number

City
State
ZIP code

Foreign country name
Foreign province/county
Foreign postal code

Type of Return
(Check all that apply.)

☐ **a.** Amended

☐ **b.** Successor employer

☐ **c.** No payments to employees in 2020

☐ **d.** Final: Business closed or stopped paying wages

Go to www.irs.gov/Form940 for instructions and the latest information.

Read the separate instructions before you complete this form. Please type or print within the boxes.

Part 1: Tell us about your return. If any line does NOT apply, leave it blank. See instructions before completing Part 1.

1a If you had to pay state unemployment tax in one state only, enter the state abbreviation

1b If you had to pay state unemployment tax in more than one state, you are a multi-state employer

2 If you paid wages in a state that is subject to CREDIT REDUCTION

1a

1b ☐ Check here.
Complete Schedule A (Form 940).

2 ☐ Check here.
Complete Schedule A (Form 940).

Part 2: Determine your FUTA tax before adjustments. If any line does NOT apply, leave it blank.

3 Total payments to all employees

3

Annual report of all wages, tax liabilities and payments made under the Federal Unemployment Tax Act (FUTA).

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Choose the plan that’s right for your business.

Recommended

Concierge

Certified HR pros and resources for even more peace of mind.

\$149/mo base price
plus **\$12/mo** per person

Complete

Better team tools so you can create a great place to work.

\$39/mo base price
plus **\$12/mo** per person

Core

Smart, streamlined payroll and benefits built for smaller teams.

\$39/mo base price
plus **\$6/mo** per person

Basic

A **beta plan** with payroll basics. Recommended for teams of 1 or 2.

\$19/mo base price
plus **\$6/mo** per person

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Contractor

Haven't hired W-2 employees yet?

We can help you pay your 1099 contractors for just

\$6 per person each month.

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- ✓ Full-service payroll across all 50 states
- ✓ Employee self service and profiles
- ✓ Workers' comp administration
- ✓ Next-day direct deposit
- ✓ PTO policies and time-off requests
- ✓ Dedicated best-in-class support
- ✓ Customizable employee onboarding tools
- ✓ Accounting and time tracking integrations
- ✓ Payroll on Autopilot®
- ✓ Health insurance administration
- ✓ Employee access to Gusto Wallet
- ✓ Employee offers and document management
- ✓ Permissions
- ✓ Employee directory and surveys
- ✓ Time tracking
- ✓ Project tracking and workforce costing
- ✓ Certified HR pros
- ✓ HR resource center

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- ✓ Payroll on Autopilot®
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 - ✓ Employee onboarding tools
 - ✓ Accounting and time tracking integrations
 - ✓ Payroll on Autopilot®
 - ✓ Health insurance administration
 - ✓ Employee access to Gusto Wallet
 - ✓ Employee offers and document management
- ~~Permissions~~
- ~~Employee directory and surveys~~
- ~~Time tracking~~
- ~~Project tracking and workforce costing~~
- ~~—Certified HR pros~~
- ~~—HR resource center~~

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- ✓ Workers' comp administration
- ✓ 4-day direct deposit
- ✓ Paid-time-off policies
- ✓ Best-in-class support

~~Employee onboarding tools~~

~~Accounting and time tracking integrations~~

~~Payroll on Autopilot®~~

~~Health insurance administration~~

~~Employee access to Gusto Wallet~~

~~Employee offers and document management~~

~~Permissions~~

~~Employee directory and surveys~~

~~Time tracking~~

~~Project tracking and workforce costing~~

~~Certified HR pros~~

~~HR resource center~~

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Choose the plan that fits your business.

Most Popular

Hustle

Bookkeeping for
less than \$20K in
monthly expenses

\$195/mo

no tax return included

Boost

Bookkeeping for
less than \$40K in
monthly expenses

\$295/mo

business & state tax
return included

Flight

Bookkeeping for
less than \$60K in
monthly expenses

\$395/mo

business & state tax
return included

Thrive

Bookkeeping for
less than \$60K in
monthly expenses

\$495/mo

business & state tax
return included

Venture

Bookkeeping for
less than \$60K in
monthly expenses

\$945/mo

business, state,
personal & sales tax
return included

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Choose the plan that fits your business.

Hustle

Bookkeeping for
less than \$20K in
monthly expenses

\$195/mo

no tax return included

- ✓ Dedicated bookkeeper
- ✓ Cash basis bookkeeping
- ✓ Modified accrual bookkeeping
- ✓ Quickbooks Online accounting software
- ✓ Xero accounting software
- ✓ Profit & Loss statements
- ✓ Balance Sheets
- ✓ Monthly trend graphs
- ✓ Mobile apps
- ✓ Standard chart of accounts
- ✓ Reports delivered by the 20th/month
- ✓ Cash basis bookkeeping
- ~~–Tax consulting~~
- ~~–Business tax returns~~
- ~~–State tax return~~
- ~~–Annual depreciation schedule~~
- ~~–Personal tax return~~
- ~~–Sales tax filing (1 state)~~

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Choose the plan that fits your business.

Boost

Bookkeeping for
less than \$40K in
monthly expenses

\$295/mo

business & state tax
return included

- ✓ Dedicated bookkeeper
- ✓ Cash basis bookkeeping
- ✓ Modified accrual bookkeeping
- ✓ Quickbooks Online accounting software
- ✓ Xero accounting software
- ✓ Profit & Loss statements
- ✓ Balance Sheets
- ✓ Monthly trend graphs
- ✓ Mobile apps
- ✓ Standard chart of accounts
- ✓ Reports delivered by the 15th/month
- ✓ Cash basis bookkeeping
- ✓ Semi-annual tax consulting
- ✓ Business tax return
- ✓ State tax return
- ~~—Annual depreciation schedule~~
- ~~—Personal tax return~~
- ~~—Sales tax filing (1 state)~~

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Choose the plan that fits your business.

Most Popular

Flight

Bookkeeping for
less than \$60K in
monthly expenses

\$395/mo

business & state tax
return included

- ✓ Dedicated bookkeeper
- ✓ Cash basis bookkeeping
- ✓ Modified accrual bookkeeping
- ✓ Quickbooks Online accounting software
- ✓ Xero accounting software
- ✓ Profit & Loss statements
- ✓ Balance Sheets
- ✓ Monthly trend graphs
- ✓ Mobile apps
- ✓ Standard chart of accounts
- ✓ Reports delivered by the 10th/month
- ✓ Cash basis bookkeeping
- ✓ Quarterly tax consulting
- ✓ Business tax return
- ✓ State tax return
- ~~—Annual depreciation schedule~~
- ~~—Personal tax return~~
- ~~—Sales tax filing (1 state)~~

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Choose the plan that fits your business.

Thrive

Bookkeeping for
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monthly expenses

\$495/mo

business & state tax
return included

- ✓ Dedicated bookkeeper
- ✓ Cash basis bookkeeping
- ✓ Modified accrual bookkeeping
- ✓ Quickbooks Online accounting software
- ✓ Xero accounting software
- ✓ Profit & Loss statements
- ✓ Balance Sheets
- ✓ Monthly trend graphs
- ✓ Mobile apps
- ✓ Standard chart of accounts
- ✓ Reports delivered by the 5th/month
- ✓ Cash/Modified accrual basis bookkeeping
- ✓ Monthly tax consulting
- ✓ Business tax return
- ✓ State tax return
- ✓ Annual depreciation schedule
- ~~—Personal tax return~~
- ~~—Sales tax filing (1 state)~~

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Choose the plan that fits your business.

Venture

Bookkeeping for
less than \$60K in
monthly expenses

\$945/mo

business, state,
personal & sales tax
return included

- ✓ Dedicated bookkeeper
- ✓ Cash basis bookkeeping
- ✓ Modified accrual bookkeeping
- ✓ Quickbooks Online accounting software
- ✓ Xero accounting software
- ✓ Profit & Loss statements
- ✓ Balance Sheets
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- ✓ State tax return
- ✓ Annual depreciation schedule
- ✓ Personal tax return
- ✓ Sales tax filing (1 state)

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Xendoo partners with Gusto for payroll services and we offer
our clients, who sign up with Gusto through Xendoo

20% off plus two months free.

Thank you



xendoo + gusto

Delivering peace of mind for your business.

✉ sales@xendoo.com