

Certified Professional Employer Organization/Customer Reporting Agreement

Department of the Treasury — Internal Revenue Service

Read the separate instructions before you complete Form 8973.

Part 1: Why are you filing this form?

- A service contract started on between the customer reported in Part 2 and the CPEO reported in Part 3.
- A service contract ended on between the customer reported in Part 2 and the CPEO reported in Part 3.
- Correcting a previously filed Form 8973.

Part 2: Customer Information

- 1 Customer's employer identification number (EIN)** -
- 2 Customer's name (not your trade name)**
- 3 Customer's trade name (if any)**
- 4 Address**
- Number Street Suite or room number
- City State ZIP code
- Foreign country name Foreign province/county Foreign postal code

- 5 Identify forms that the CPEO will file reporting wages or compensation paid to employees performing services for the customer. Check all that apply.**
- | | CPEO reports all wages/
compensation paid to
employees | CPEO reports some
wages/compensation
paid to employees |
|--|---|---|
| Form 940, 940-PR (Employer's Annual Federal Unemployment (FUTA) Tax Return) | <input type="checkbox"/> | <input type="checkbox"/> |
| Form 941, 941-PR, 941-SS (Employer's QUARTERLY Federal Tax Return) | <input type="checkbox"/> | <input type="checkbox"/> |
| Form 943, 943-PR (Employer's Annual Federal Tax Return for Agricultural Employees) | <input type="checkbox"/> | <input type="checkbox"/> |
| Form CT-1 (Employer's Annual Railroad Retirement Tax Return) | <input type="checkbox"/> | <input type="checkbox"/> |

Part 3: CPEO Information

- 6 CPEO's employer identification number (EIN)** -
- 7 CPEO's name (not your trade name)**
- 8 CPEO's trade name (if any)**
- 9 Address**
- Number Street Suite or room number
- City State ZIP code

Part 4: Customer Relationship Information

- 10 Is the CPEO's relationship with the customer reported in Part 2 subject to a contract described under section 7705(e)(2) (also called a CPEO contract)? Yes No*
*If "No," skip lines 11-13.
- 11 Is the customer reported in Part 2 a provider of employment-related services (for example, a professional employer organization)? Yes No
- 12 Is the customer reported in Part 2 a related party of the CPEO? Yes No
- 13 Does the CPEO apply the exemptions, exclusions, definitions, and other rules which are based on type of employer under sections 3511(a)(2) and 3511(c)(2) to the customer reported in Part 2? Yes No

Part 5: Customer Signature

I declare that I have examined this form, and to the best of my knowledge and belief, Parts 1, 2, and 4 are true, correct, and complete. I certify that I have the authority to execute this form for the customer reported in Part 2.



Sign your name here

Print your name here

Date

Print your title here

Email address

Best daytime phone

Part 6: CPEO Signature

Under penalties of perjury, I declare that I have examined this form, and to the best of my knowledge and belief, it is true, correct, and complete. I certify that I have the authority to execute this form for the CPEO reported in Part 3.



Sign your name here

Print your name here

Date

Print your title here

Email address

Best daytime phone

CPEO Consent to Disclosure of Tax Information

To maintain certification, a Certified Professional Employer Organization (CPEO) must complete this consent to disclose tax information to the customer reported on Form 8973 and send it to the IRS.

By signing, dating, and entering my employer identification number (EIN) at the bottom of this page, I hereby consent, to the extent necessary to carry out the purposes of the CPEO program, to the IRS disclosing, to the customer named below, information from my employment tax returns (for example, Forms 940 and 941) filed with respect to the customer named below. This consent also covers the disclosure of any information regarding my obligations to report, deposit, and pay federal employment taxes for the customer named below. I also consent to the disclosure of information about my certification, regardless of year.

The customer named below is authorized to inspect and/or receive the confidential tax information identified above for the tax forms and tax periods listed below. See the instructions for details on how to report the tax periods.

Customer's name (from Form 8973, Part 2)

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Customer's EIN (from Form 8973, Part 2)

Tax Form Number (940, 941, 943, CT-1)	Year(s) or Period(s)

I understand that the information to be disclosed is generally confidential under the laws applicable to the IRS and that the customer receiving the information is not bound by these laws and may use the information for any purpose as permitted by other federal laws and/or state laws. I certify that I have the authority to execute this consent.



Sign your name here

Print your name here

Date

Print your title here

CPEO's EIN

-

CPEO's name