

OPOLIS

Get Ready for Onboarding

We're excited that you've made the decision to become an Opolis Member. The onboarding process should take roughly 45 minutes. To ensure a smooth onboarding process, we've compiled the checklist below for all of the information and documentation you'll want to have on hand.

-  It's beneficial to have your entity formed before starting the onboarding process. You will need your Incorporation Documents when you start onboarding so that you can retrieve:
 - Entity formation date
 - EIN NumberYou will be asked to upload a PDF or PNG (max size 10MB) of your Incorporation Documents or Articles of Organization. Make sure to have a copy scanned and ready to upload from your device. Remember, to become an Opolis Member you can have either an LLC with an 'S' Corp designation or a 'C' Corp. Learn more about these entities [here](#) and if you need some help getting started with the process, we've created an [easy submission process here](#)
-  For tax compliance purposes, you will be asked for your tax filing status, number of dependents, any optional additional withholdings and deductions, and social security number. Please be prepared with the information needed to complete this section.
-  You will be asked to verify your identity. Please review the [list of acceptable identity documents](#) and have your chosen identity documents scanned and ready for upload from your device.
-  To set up deposit of your semi-monthly paycheck, you will be asked for your personal bank account. Please have your routing number and account number ready for input.
-  To set up funding of your payroll in USD, you will be asked for your business bank account. We strongly recommend setting up your business bank account before starting the onboarding process. Opolis uses Plaid to automatically and securely connect with your business bank account during the onboarding process.
-  If you intend to participate in Opolis group benefits, please review the [Opolis Benefits Guide](#) to learn more about your options. You will be asked to make your benefit selections during the onboarding process. If you have dependents, please ensure you have their social security numbers and dates of birth ready for input.
-  Opolis Members automatically receive disability and life insurance. Be prepared to list the names, social security numbers, and dates of birth of your stated beneficiaries of insurance disbursements.
-  You will need to pay for your final month of benefit premiums (think of this as last month's rent for an apartment). If you're paying via ACH, this will be deducted from your business bank account.

Have any questions?

Please reach out to us at membership@opolis.co