



SCHUMAN SIMON & GRODECKI, LTD.

**CERTIFIED PUBLIC ACCOUNTANTS | ACCOUNTING, TAX, CONSULTING
626 WEST JACKSON BLVD., SUITE 650 | CHICAGO, ILLINOIS 60661- 5670**

SS+G Invoice Payment Options

Invoice payments for our services can be paid via check, [Zelle®](#) or approved incoming ACH payments.

1. Check Payments

Checks should be payable to “Schuman, Simon & Grodecki, Ltd.” and be mailed to our office at

Schuman, Simon & Grodecki, Ltd.
626 W. Jackson Blvd, Suite 650
Chicago, IL 60661-5670

2. ACH Incoming Payments

Contact your SS+G preparer for instructions and approval of this payment method. The ACH payment must be initiated by the taxpayer and approved by SS+G prior to sending payment.

3. Zelle Payments

[Zelle®](#) can be used to electronically pay our invoice. Zelle® account setup requires you to "opt in" on your bank website or mobile app.

How to add SS+G as a Zelle Recipient

If you are confident in using Zelle, add us to your recipients or contact SS+G to initiate a payment request.

If you send to a incorrect user the money may not be recoverable.

Double and triple check our email address for accuracy before sending as SS+G is NOT responsible for client typos or incorrect payments.

Recipient Name

SCHUMAN SIMON GRODECKI, LTD

SS+G Email Associated for Zelle Payments

ssgzelle@gmail.com " S S G Z E L L E @ G M A I L (dot) C O M "

MEMO Description

Please write a description of payment then taxpayer's last name or entity.

Example "2021 Tax Preparation (last name or entity)" or "6.1.2022 Invoice (last name or entity)"

Zelle “Payment Request” from SS+G

We recommend asking for a payment request (instructions below) as payments can not be retracted!

Email your SS+G representative or ssgzelle@gmail.com that you would like to pay invoice via [Zelle®](#).

Please provide the following:

- Name and/or Entity Name
- Invoice Amount
- Invoice Description
- Email or Phone Number associated with your Zelle

We will send you a "payment request" which will say:

Requested Amount

Requesting as

SCHUMAN SIMON GRODECKI, LTD.,
CHICAGO, IL

You will receive a notification as an email and/or text message based on how you setup your Zelle settings with instructions of the transfer.

Click on the notification and follow the on screen instructions to complete the payment.

Upon a successful payment, both of us will receive a confirmation email and/or text message based on how you setup your Zelle settings.

Zelle – Additional Information

Think of [Zelle®](#) as an instant check. Once you authorize a money transfer (payment in our case), the payment is processed and your money is instantly transferred from your bank account electronically to our bank account. To transfer money, the only information you need is a Zelle user (person or business) phone number or email so banking information remains confidential.

Instant payments mean NO more check writing, mailing checks (lost in mail or fees for certified payments), or waiting for checks to be cashed.

*Must have a U.S. Bank account and can NOT use a debit / credit card.

*Transfers are only allowed from U.S. Bank account to U.S. Bank account.

Sign Up for Zelle

You are responsible for your [Zelle®](#) account creation and its continued security. SS+G can NOT assist in Zelle account creation. We strongly suggest you setup both a strong web and/or mobile app bank password with 2-step authorization. You must Opt into Zelle.

<u>Bank Name</u>	<u>Daily Sending Limit</u>	<u>7 - Day Sending Limit</u>	<u>30 - Day Sending Limit</u>
Bank of America	\$3,500	\$10,000	\$20,000
Capital One	\$2,500		\$10,000
Chase - Personal	\$2,000	\$14,000	\$16,000
Chase - Business	\$5,000	\$35,000	\$40,000
Citibank	\$2,500	\$15,000	\$15,000
PNC	\$1,000	\$7,000	\$5,000
TD Bank	\$2,500	\$10,000	\$10,000
Wells Fargo	\$3,500	\$17,000	\$20,000

Yours truly,

Schuman Simon & Gradecki, Ltd.