

## checklist

# What to Know When Assessing Your PEO

Professional Employer Organizations (PEOs) can be a great way to offload the responsibilities associated with complicated and time-consuming HR activities that often have legal ramifications associated with them. They often offer solutions like HR administration and benefit administration, which can be a great option for companies without in-house HR representatives.

But, how do you know if your PEO is still the right fit for your business? Use this guide to get started assessing your needs.

### Has your company experienced any of the below changes? (Select all that apply)

- Headcount has fluctuated
- Gross payroll has increased
- Had a merger or acquisition
- Experiencing recruiting and retention challenges

### Have you experienced any of the below with your current PEO provider? (Select all that apply)

- Limited benefits options
- Generic reporting
- Disconnected systems
- Lack of transparency for fees and markups
- Inadequate service accountability

### Is your PEO limiting the number of health/dental plans or carriers you can offer your group?

Yes      No

### Are you receiving your Section 125 tax savings as an employer or is it going to the PEO?

I am receiving my Section 125 tax savings  
Section 125 tax savings are going to my PEO

### Are you receiving all workers compensation credits for your policy?

Yes      No

If you selected anything above or expect you will, it may be time to look at options that better fit your business now and into the future.



## Better Together

We're in this with you and can guide you from the assessment to switching from your PEO if that's where you land. We've helped many clients through this to make sure their solutions grow with their company's needs, and we'll do the same for you.

## We've Got You Covered

You need a complete solution, and that is what we will deliver. You'll have access to an all-in-one HR and payroll software platform, help with workers compensation, employee benefits, compliance, and other HR services.

We'll work with you to identify the solution that gives you:

- Lower costs
- More flexibility
- More customization
- More control

**Ready to discuss more? Let's get started.**

We will walk you through what you need to know, ask and do with your current PEO when the timing is right.

