

Enhanced Business Services

PFSI is proud to offer Enhanced Business Services to provide solutions for Payroll, Human Resources, and Benefits. Let us keep your business working so you can focus on moving your business forward.

Payroll Services

Payroll services can be expensive, time-consuming, and frustrating. We can help with 2 different levels of payroll services: Essential Payroll and Complete Payroll. Both provide a baseline of services with Complete Payroll offering availability of additional services including monthly reconciliations or billing, enrollment and payroll deductions and contributions. Our software is powered by Intuit, one of the leading accounting and payroll software vendors.

Essential Payroll:

Is serviced through Intuit and includes:

- Payments from salary, commission, hourly rates.
- Payroll for multiple locations & states.
- Payroll for multiple pay schedules.
- Direct deposit for employees & contractors with secure online paystub access.
- Tax payments and filings prepared for you and electronically submitted.
- Paid time off tracking for both sick time & vacation time.
- Payroll automatically syncs with QuickBooks Online or import transactions for QuickBooks Desktop.

Complete Payroll:

Is the most comprehensive service available. Complete Payroll includes all of the Essential Payroll features as well as the additional features below.

- PFSI processes reported hours for all employees and contractors
- PFSI processes tax payment and filings
- PFSI provides detailed reporting for each processed check, including PTO tracking
- Additional Enhanced Services also available for additional fees

Service Pricing & Billing

Our services are customizable and we will work with you to find solutions that cater to exactly what your business needs. Services are billed monthly by automatic ACH payments.

	Essential	Complete
Monthly Base Fee	\$40	\$40
Per Employee Per Month (PEPM)	\$2	\$6
PEPM w/ Benefits	\$2	\$4
Set Up Fee (One Time)	\$100	\$50

PFSI benefits get you a discount! And, it allows you to select additional services for managing enrollment and reconciliation of your monthly bills with your payroll deductions and contributions.

Set up fees apply to new accounts only. One time fee will be charged the first month of service.

Enhanced Business Services

PFSI can help you maintain control of your costs for payroll, benefits, employee garnishments or loans. We offer complete integration for your group benefits with our payroll services. When was the last time expenses, deductions, contributions, garnishments, taxes, etc., were reconciled in the month they occurred? Subscribing to PFSI's Enhanced Business Services provides complete control with monthly reporting and reconciliation all from the same trusted partner. Reduce costly mistakes with consistent and accurate services designed to help you run your business better.

Enhanced HR Services

PFSI provides discounted HR services through our partner HR Answerlink. Basic services, such as resources libraries and common form/policy templates, are available to our small group benefits clients at no cost. For only **\$30 per month**, employers can have access to live support by phone email or chat and personalized reviews for employee handbooks. Small cost, big return.

Service Summary & Comparison

Payroll Services

	Essential	Complete	Additional fees
Employer Payroll Input			
Online: Computer, Tablet, Phone	✓	✓	
Fax	X	✓	
Phone Call	X	✓	
Email	X	✓	
Online Employee Paystub	✓	✓	
PFSI Processing Support	X	✓	
Electronic Federal & State Tax Payments	✓	✓	
Electronic Tax Report Filing	✓	✓	
Downloadable Tax Documents & Library	✓	✓	
Downloadable W-2's	✓	✓	
Downloadable 1099's	✓	✓	\$30 Flat Fee
Automatic Reminders	✓	✓	
2-Step Verificaiton & Security	✓	✓	
Direct Deposit	✓	✓	
Manual Paychecks	✓	✓	
Detailed Reporting	✓	✓	
Expert Customer & Technical Support	✓	✓	
Quickbooks Integration & Import	✓	✓	
Discounted Service Fees	X	✓	\$60/hr, 0.5hr minimum. 50% Discount for Complete Payroll clients.
Discounted Set Up Fee	X	✓	One time set up fee of \$100, \$50 for Complete Payroll clients, FREE with group medical enrollment

Enhanced Business Services

	Essential	Complete	Additional fees
Benefits Integration	X	✓	
Comprehensive Analysis	X	✓	
Custom Package Design	X	✓	
Online Enrollment	X	✓	
Personalized Service	X	✓	
Benefits Reconciliation	X	✓	\$2 PEPM, \$30/mo minimum
POP Document Support	✓	✓	\$50 Flat Fee, Annual Document
Worker's Comp Integration	✓	✓	\$60 Flat Fee
Worker's Comp Audit Preparation & Submission	✓	✓	
401K Contribution Uploads	✓	✓	\$1 PEPM, \$30/mo Minimum
HSA Contribution Uploads	✓	✓	\$1 PEPM, \$30/mo Minimum

Enhanced HR Services

	Essential	Complete	Additional fees
COBRA/State Continuation Support	✓	✓	Services provided through Davis Flex Spending, additional fees apply.
New Hire On-Boarding	X	✓	Included with Benefits
HRIS Management System	X	✓	Included with Benefits
HR Support Center	X	✓	
HR Forms & Templates Library	X	✓	Included with Benefits
Employee Handbook tools	X	✓	Included with Benefits
HR Law Library	X	✓	Included with Benefits
On-Demand Q&A	X	✓	\$30/mo

The PFSI Advantage

We value our customers and want to be your agent for life. Superior customer service is what sets us apart from other agents and that's exactly what you can expect from us. Even after your policies are in place, our account managers are always available to help you resolve any issue that may arise, from address changes to billing questions to claims issues. We also conduct an annual review of your policies to ensure you're still getting the best deal for the coverage you need.

The staff of Professional Financial Specialists Inc. is friendly, knowledgeable and truly looks forward to helping our clients find the best solutions for their insurance & business services needs. As a full-service agency, we provide our clients with a single point of contact for every insurance need. You are more than a policy number when you contact PFSI. We get to know you and your staff, and we would like you to get to know us.