

PEO INSIDE

PUBLISHED BY THE NATIONAL ASSOCIATION OF
PROFESSIONAL EMPLOYER ORGANIZATIONS*

THIS MONTH'S FOCUS

SUPPORTING THE MODERN WORKFORCE

THE PEOPLE
FACTOR:
EMPOWERING
TALENT

THE BENEFITS
LANDSCAPE

FINANCIAL
FRONTLINES

COVER STORY

MEET BILL MANESS

NAPEO'S 2025-2026 BOARD OF DIRECTORS CHAIR

Bill Maness, CEO, Syndeo

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BUILDING ON OUR PROGRESS

BY BILL MANESS

As we embark on preparing for what 2026 holds in our future, I'd be remiss in not acknowledging how far we have come in 2025. The growth of our industry is making a significant impact on the many fronts we assist our client companies in their pursuit of growing their own businesses.

The One Big Beautiful Bill Act has given us certainty in some areas that are of major concern to our industry and clients. While there are still areas we need to address, our presence on the hill, both federally and in each state, has never been more needed than today. The NAPEO PAC has surpassed \$150,000 in contributions this cycle with more to come. Our continued commitment to the industry, of being on the forefront of issues and proactively helping to craft legislation that enhances our abilities to serve our clients, has served us well in 2025.

Our Annual Conference and Marketplace in Austin was *electric* and I

can't thank you all enough for your presence and commitment to making our time together worthwhile. Raising over \$250,000 for Anthropos Arts in our NAPEO Gives Back campaign proved yet again that the **Power Of Many** was on exhibit by all who contributed. I am constantly amazed and humbled by our ability to leave our world a better place than we found it each year.

The NextGen and WIN initiatives continue to grow and are a firm foundation for the future. The investment we are all making in growing the future of NAPEO membership is well worth the effort and I hope that more of you will get involved in both of these worthy endeavors.

As we move our individual companies forward in 2026, know that the NAPEO board and staff are in alignment with providing the best outcomes for whatever we collectively have to face this coming year. My commitment to each of you is that I will remain



As we move our individual companies forward in 2026, know that the NAPEO board and staff are in alignment with providing the best outcomes for whatever we collectively have to face this coming year.

accessible in leading the most collaborative and respected industry I have ever been associated with. ■



BILL MANESS

2025-2026 NAPEO Chair
CEO
Syndeo

QUICK HITS

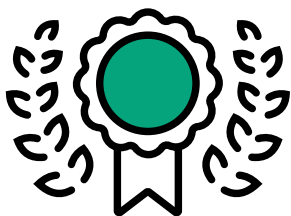
DATA

TOP CERTIFICATIONS DRIVING FUTURE SKILLS AND WAGE GROWTH

Resume Now's Skills and Certifications of 2030 Report highlights how short-term, non-degree credentials can boost pay while preparing workers for the fastest-growing skills of the next decade. Drawing on World Economic Forum projections and Burning Glass Institute wage data, the analysis identifies certifications that directly link future-ready skills to real income gains.

Key findings:

- AI and big data skills are projected to grow by 90%.
- SQL for Data Analytics is tied to a \$6,800 wage boost.
- Business Innovation certification is linked to a \$7,100 boost.
- Emotional Intelligence at Work is associated with a \$6,000 gain.
- Most certifications are short-term and do not require a degree.



CONGRATULATIONS

STRATUS HR NAMED A UTAH TOP WORKPLACE FOR SIXTH CONSECUTIVE YEAR

NAPEO member Stratus HR has been named a Utah Top Workplace by The Salt Lake Tribune for the sixth year in a row. Stratus also earned a special award for "Benefits," reflecting a high score in the employee benefits category. "Being named a Utah Top Workplace for six straight years, with an added emphasis on great employee benefits, validates our belief that when you create an environment where people feel respected, supported and empowered, success naturally follows," said Stratus HR CEO John Farnsworth.

MEMBERSHIP

PREPARE FOR NAPEO MEMBERSHIP RENEWALS

It's about that time! NAPEO membership renewals are right around the corner. The NAPEO membership team is aiming to open renewals on October 15th. If you are a PEO member, please prepare for your membership renewal by having your 2025 Q3 941(s) in hand and your employees and clients by state ready to share with us. Any PEO renewal questions can be directed to Andrea Desmond, adesmond@napeo.org, or Cass Likouris, clikouris@napeo.org. Any associate member questions regarding renewals can be directed to Nancy Benoudiz, nbenoudiz@napeo.org. The deadline to renew, as always, is December 31st, but to avoid disruption and delays due to the holidays, we recommend renewing by December 23rd. Please don't hesitate to reach out with any questions!

KUDOS

PROPEL HR NAMED TO CHIEF MARKETER'S TOP 50 CAMPAIGNS OF 2025

Chief Marketer has recognized NAPEO member Propel HR's "The Propellers" marketing campaign in its Top 50 Campaigns of the Year 2025. This year's awards spotlight 50 marketing programs recognized for their creativity, effectiveness and overall excellence across every discipline. "Marketing teams today are navigating tighter budgets, higher expectations and constant change—which makes this year's achievements even more remarkable," said Chief Marketer Content Director Kaylee Hultgren.

CONGRATULATIONS

NEXTEP RECOGNIZED AS GREAT PLACE TO WORK®

NAPEO member Nextep has once again been certified as a Great Place To Work® for the sixth consecutive year. Known for its fun, people-first and supportive culture, Nextep prioritizes pride in work and creates an environment where employees thrive. Guided by four core values: people, transparency, celebrating success and entrepreneurial spirit, Nextep's culture shines through in countless ways, including community outreach, company events and recognition programs.

KUDOS

OPTIMUM HR NAMED ONE OF ORANGE COUNTY BUSINESS JOURNAL'S FASTEST-GROWING PRIVATELY HELD COMPANIES OF 2025

NAPEO member Optimum HR has been recognized for the third consecutive year on the Orange County Business Journal's list of the Fastest-Growing Privately Held Companies for 2025. This honor recognizes Orange County organizations that have achieved notable growth and shown strong leadership in their industries. "Being recognized among Orange County's fastest-growing companies is an incredible honor. Our success stems from the dedication of our team and the loyalty of our clients. Growth is only possible when both come together, and we are so proud to share this award with everyone who has been part of our journey," said Optimum HR CEO Kevin Gramian.

CONGRATULATIONS

G&A PARTNERS BECOMES FIRST-EVER 20-TIME HONOREE IN INC. 5000 HISTORY

NAPEO member G&A Partners was named to Inc. Magazine's list of the fastest-growing private companies in America, becoming the only company to achieve recognition 20 times. "Earning a spot on the Inc. 5000 is always an honor—but to be recognized for the 20th time is a true testament to the strength of our team, the loyalty of our clients, and our commitment to continuous growth. Over two decades, we've evolved with the market, embraced change, and stayed true to our mission to deliver world-class HR services that empower our clients to achieve their dreams and pursue their passions. This milestone reflects not just our past performance, but our relentless drive to keep building a business that makes a lasting impact," said G&A Partners President and CEO John W. Allen.

LEGISLATIVE WIN

NEW JERSEY GOVERNOR SIGNS LAW PROTECTING PEOs

New Jersey Governor Phil Murphy signed A5506/S.3773 into law. NAPEO and many of our members championed this legislation to protect PEOs in the Garden State. The law amends another statute (P.L. 2022, c.120) that requires employers to notify the New Jersey Department of Labor "immediately and simultaneously" when an employee is separated from their employer. Our legislation provides important protections for PEOs by moving liability and penalties from a PEO to a client company for failure to provide timely notice. The Governor's action represents the very best of our advocacy efforts. We greatly appreciate everyone who pitched in on this effort to ensure the PEO voice was heard in Trenton!

LEADERSHIP

LINCOLN FINANCIAL APPOINTS GEOFF VANDAL AS VICE PRESIDENT, PROFESSIONAL EMPLOYER ORGANIZATIONS & SPECIALTY MARKET SALES

NAPEO member Lincoln Financial announced that Geoff Vandal has joined the company to lead professional employer organization (PEO) sales. "Geoff has an incredible track record of more than 15 years in specialty market benefits. As Lincoln grows, we identified a need to add talent to our team so we can strategically expand into key markets, including the professional employer organization market. Geoff's experience is a great addition to our already strong team, and his presence will significantly enhance our reach," said Lincoln Financial Executive Vice President, President of Workplace Solutions Jimmy Reid.

LOOKING AHEAD

HEALTHCARE COSTS SET TO RISE 8.4%: WHAT EMPLOYERS NEED TO KNOW NOW

Healthcare costs are projected to rise 8.4% next year, adding about \$1,300 in annual expenses per employee. Much of this increase will be driven by specialty drugs such as GLP-1 medications for weight management and diabetes, as well as the growing prevalence of chronic conditions, mental health needs and ongoing labor shortages. Employers can help manage these cost pressures by encouraging the use of lower-cost biosimilars and generics, guiding employees toward more affordable care options, requiring prior authorizations for high-cost medications, monitoring healthcare utilization to prevent unnecessary spending and strengthening vendor relationships to maintain both quality and cost control.

QUICK HITS

LEADERSHIP

FRANKCRUM'S ANNA HOLDER NAMED TO TBBJ'S 40 UNDER 40 FOR TRANSFORMATIONAL LEADERSHIP

Anna Holder, senior vice president of client services and operations at NAPEO member FrankCrum, has been named to the Tampa Bay Business Journal's 2025 40 Under 40 list. The recognition celebrates Tampa Bay's rising professionals who demonstrate innovation, purposeful leadership and meaningful impact in their industries and communities. "Anna's growth has happened alongside the growth of FrankCrum, and she has played a pivotal role in the company's success. We are blessed to get to work with her each and every day," said FrankCrum Co-President Haley Crum.

PARTNERSHIP

STITCH PEO PARTNERS WITH GREENWAY HEALTH®

NAPEO member Stitch PEO has partnered with Greenway Health, an electronic health record provider, to give Greenway customers access to Stitch's HR, payroll and employee benefits solutions. The alliance will help independent medical practices reduce administrative workload, improve staff retention and keep their focus on patient care.

PARTNERSHIP

EXTENSISHR EARNs 2025 GREAT PLACE TO WORK CERTIFICATION™

NAPEO member ExtensisHR has been recognized as a Great Place To Work®, a certification based on positive employee feedback about the company's culture, leadership and overall experience. "As a founder, nothing fills me with more pride than being part of a company that has created hundreds of jobs and fostered an exceptional workplace environment," said ExtensisHR Founder and Executive Chairman Richard Augustyn in a release on the certification. ■



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SUPPORTING THE MODERN WORKFORCE

SHINING TALENT



15 RETENTION STRATEGIES EVERY PEO SHOULD USE TODAY

BY KRISTEN FRADIANI

T

he competition for top talent is only getting stronger. For PEOs, high turnover can affect not only internal operations but also the quality and consistency of client services. That's why retention is no longer just an HR function. It is a core business strategy.

The good news is that people tend to stay where they feel supported, challenged, and set up to succeed. As a PEO leader, you are in a position to shape that experience both within your organization and across the client teams you support. The key is to treat retention like a long-term investment, not something you scramble to fix when someone's already walking out the door.

Here are 15 people-first strategies that can help you keep great talent, build stronger teams, and bring even more value to the organizations you support.

1. SUPPORT YOUR MANAGERS WITH THE TOOLS THEY NEED

Managers have more influence on engagement and retention than any other role in the organization. In fact, supportive management can more than double employee retention, according to Bonusly's Value of an Engaged Workforce report.

Many managers are promoted without the training or structure to lead well. Set them up for success with targeted training, peer support, and consistent feedback. When managers are equipped to lead with clarity and confidence, teams are more stable, turnover drops, and client-facing service improves.

2. MAKE CONTINUOUS LEARNING THE DEFAULT, NOT THE PERK

Growth is a top priority for today's workforce. Whether it's through certifications, mentorship, or access to skill-based learning platforms, offering growth opportunities shows you're invested in their future. Learning drives engagement and helps employees envision a future with your organization.

3. STRENGTHEN YOUR ONBOARDING PROCESS

Onboarding sets the tone. If it's just paperwork and policies, you're missing a huge opportunity. What really matters is helping new hires feel connected early — to the team, the culture, and the bigger picture. When people feel welcomed early on, they're more likely to stay and contribute.

4. BUILD FLEXIBILITY INTO YOUR MODEL

Flexibility is now an expectation, not a perk. That doesn't mean compromising performance. Instead,

give employees ownership over how they achieve results. Options like hybrid work or adjusted hours reduce burnout and support accountability.

5. PRIORITIZE MENTAL AND PHYSICAL WELLBEING

Wellbeing is more than an EAP. It is a workplace culture where rest, recovery, and mental health are part of how work gets done. When leaders prioritize wellbeing through both their messaging and actions, it gives employees permission to do the same.

6. HELP EMPLOYEES FIND PURPOSE IN THEIR WORK

People want to know their work matters. Connect roles and responsibilities to the broader mission. Highlight the impact your team has on client outcomes. A strong sense of purpose builds commitment, especially during times of change. It turns day-to-day tasks into something greater and supports long-term retention.

7. OFFER INTERNAL CAREER GROWTH PATHWAYS

Retention is closely tied to opportunity. Create visible, structured career paths and offer tools to help employees move forward. Whether it's lateral moves, leadership training, or special projects, growth doesn't have to mean a promotion—but it does have to be real.

8. RECOGNIZE AND REWARD CONTRIBUTIONS OFTEN

Appreciation fuels loyalty. A thoughtful thank-you, a quick mention in a team meeting, or celebrating milestones can reinforce that someone's effort matters. Make recognition part of the culture so employees at every level feel valued and motivated.

By making pay structures transparent and tied to measurable criteria, you reduce confusion, build trust, and create a more motivated workforce — both inside your organization and across the clients you support.

9. MAKE CAREER DEVELOPMENT A SHARED EFFORT

Career growth should be collaborative. Use development plans and regular check-ins to help employees define their goals and take ownership of their path. When people feel both supported and empowered to move forward, they're more likely to stay, grow, and contribute at a higher level.

10. LISTEN WITH INTENTION

Feedback only matters when it leads to action. Use surveys, roundtables, or check-ins to understand what's working and what's not. Then close the loop. Share what you heard and what you're doing about it.

11. ALIGN BENEFITS WITH LIFE STAGES

What matters to a 25-year-old may not matter to someone caring for aging parents. Tailor benefits like caregiver support or financial tools to match employee needs across life stages. It signals that your organization is thinking long-term about retention.

12. USE STAY INTERVIEWS TO BUILD TRUST

Stay interviews help surface issues early and lead to simple but impactful changes. Done well, they uncover small, actionable changes that can make a big difference.

13. BUILD A CULTURE OF BELONGING

Diversity efforts are a start, but lasting impact comes from building workplaces where people feel respected and supported in doing their best work. That means strong leadership, fair opportunities to grow, and clear standards that apply to everyone. When employees feel like they're part of the team and their contributions matter, they're more likely to stay, perform, and help the business succeed.

14. MAKE COMPENSATION GROWTH PATHS TRANSPARENT

When compensation expectations aren't clear, it creates uncertainty and disengagement. High-performing employees want to understand how to grow their pay based on results, skills, and time in role. By making pay structures transparent and tied to measurable criteria, you reduce confusion, build trust, and create a more motivated workforce — both inside your organization and across the clients you support.

15. OFFER SKILL-STACKING SABBATICALS

While traditional sabbaticals are still uncommon, many organizations are finding value in short-term, development-focused leave. These learning-based breaks allow employees to recharge while building new skills that directly benefit

the business. When structured well, they help retain top performers, strengthen engagement, and bring fresh capabilities back to the team.

HERE'S WHAT THIS MEANS FOR YOUR PEOPLE

Retention isn't just about holding on to great people. It's about creating a stronger, more resilient business. When your team stays, service improves. When your clients retain talent, your value increases. When you model retention well, your credibility grows.

If you're not already using these strategies inside your own team, start there. Then think about how you can bring them into the way you support clients. That kind of alignment sets you apart in a crowded space.

At the end of the day, it's simple. When you invest in your people, they stick around and give their best. Retention starts with trust, builds with growth, and lasts when people truly feel like they belong.

Now is the time to ask: "Are we doing everything we can to support our people and help our clients do the same?" ■



KRISTEN FRADIANI

Content Marketing Manager
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Branford, CT

THE WORKFORCE REBOOT RETHINKING TALENT IN A SHIFTING WORLD

BY MUKUND TATHACHARYA

There was a time when building a career followed a predictable playbook, graduate, land a job, climb the ladder, retire. But those days are long gone.

Today's workforce is shaped by complexity, mobility, and purpose. Careers are no longer linear; they zigzag across industries, life stages, and personal priorities. People are leaving traditional roles to freelance, start businesses, pursue passion projects, or simply find more balance.

In this new world of work, organizations that continue operating with outdated talent models are already falling behind. It's no longer enough to optimize workflows or streamline HR systems. It's time to completely rethink how we attract, develop, and retain people.

FROM HIRING TO BELONGING

Attracting talent today means much more than posting a job and offering a competitive salary. People want to know who you are, what you stand for, how you treat your team, and whether there's room for them to grow.

Recruitment has become deeply personal. It starts with your employer brand, is reinforced through every interaction, and ultimately hinges on authenticity. It's no longer about "filling a role", it's about creating a workplace where people want to stay, contribute, and evolve.

And once they're in the door, it's not promotions or perks that keep them. It's connection. It's culture. It's whether they

feel seen, heard, and empowered. If they can see a future with you, they won't go looking for one elsewhere.

EMPLOYEE EXPECTATIONS HAVE CHANGED - FOR GOOD

The modern employee is asking different questions:

- "Will I be trusted?"
- "Can I work flexibly?"
- "Will I have opportunities to grow?"

Compensation still matters, but meaning matters more. People want work that aligns with their values. They want flexibility without stigma. They want to work for leaders who coach, not command. And they want inclusion that's real, not performative.

Organizations that treat these expectations as core business priorities, rather than employee "extras," will attract and keep the best talent. It's about listening, evolving, and creating workplaces that feel, and function, like communities.

BENEFITS THAT ACTUALLY MATTER

Free snacks and ping pong tables? Nice, but not game changers.

Modern professionals want benefits that support their real lives, mental health resources, parental support, generous leave policies, flexible hours, and financial wellness programs. The best employers are rethinking benefits not as perks, but as essential tools for sustaining performance and well-being.

It's not about offering more, it's about offering what's meaningful.

FIVE GENERATIONS, ONE WORKFORCE

With Gen Z entering the workforce and Seasoned professionals in it, today's teams span five generations, and each one brings something unique to the table.

But this also means different communication styles, motivators, and working preferences. Leaders need to stay flexible, open, and curious. Cross-generational mentorship, personalized management, and a culture of mutual respect are key.

It's not about treating everyone the same, it's about creating space for everyone to thrive.

THE RISE OF THE EXTENDED WORKFORCE

The workforce isn't just made up of full-time employees anymore. Freelancers, consultants, contractors, and gig workers are becoming a permanent, and essential, part of how work gets done.

These professionals bring agility, speed, and specialized expertise. They help organizations move faster, scale smarter, and stay more competitive. But they can't be treated as afterthoughts. They need clear roles, inclusive onboarding, and tools to collaborate seamlessly with internal teams.

Organizations that integrate external talent as true partners, rather than temporary fixes, will be the ones that thrive in a blended workforce model. ■



MUKUND TATHACHARYA

Vice President
InterPro Global
Chennai, Tamilnadu, India



THE POWER OF MENTORSHIP CULTIVATING THE NEXT GENERATION OF LEADERS

BY ABRAM FINKELSTEIN

When I first entered the PEO industry, I had absolutely no idea what it was about. I was a relatively new lawyer that inadvertently found his way into the business that, at that time, was called employee leasing. I didn't know anything about payroll, payroll taxes, insurance or even human resources. To say that the learning curve was steep is an understatement.

I remember sitting in Mike Miller's office, an attorney that was going to assist me in the Florida licensing process. Mike told me that he would represent me, but only if I promised to get involved with the industry association which, at that time, was NAPEO and the local chapter, FAPEO.

I followed Mike's guidance and quickly got involved in the industry association because I knew it was imperative to learn as much as I could as quickly as I could and I could not think of a better place to do that. I was not disappointed; my participation surrounded me with the founders of the industry along with the people that would shape its future. I saw all of the things that good operators should do and many of the things that would lead to problems. Along the way, I made great friends, as well. I had found my mentors and I attribute much of my learning and success to them.

CREATING A MENTOR PROGRAM

There are a lot of definitions of mentorship, but they all seem to have some common elements. One source states that, "Mentorship is a protected relationship in which a more knowledgeable or experienced person guides and nurtures the professional development or growth of another, outside the normal manager / subordinate line management."¹

What is much more important is that mentorship transcends mere supervision and training. A mentor / mentee relationship is one in which the mentor becomes invested in the personal and professional development and outcome of the mentee. Said another way, mentorship is important because it is "having someone in your corner who can provide feedback, encouragement and support to help you grow both professionally and personally."²

The benefits of creating an environment in which an organization values the growth of its team seems obvious. However, the culture of growth requires much more than just a friendly and cohesive environment. It must passionately propagate the environment that allows for the personal and professional development of every person on the team. It must be a part of the DNA of the organization. Mentorship is a key component of that growth and can provide many benefits, including knowledge, setting goals, connections, feedback and growth.²

If an organization wants to create a mentorship program, it should focus on what the ultimate goal of the program will be. For example, will it be to reduce employee turnover? To increase the engagement of employees? To develop an employee succession program? Articulating the objectives is a great first step to developing a program.³

While SHRM created guidance for mentorship programs for students and professionals within the HR profession, much of their program could apply to any organization. According to SHRM, to create a formal mentorship program, an organization must create some basic guidelines. For example, they must first define who can participate in the program. How long will the mentorship last? How will people be matched up? What are the specific activities? In order to develop these guidelines, the organization needs to select someone to organize and coordinate the program.⁴

Just like everything else in business, it doesn't matter how good you are if no one knows about it! Therefore, it is important to promote the benefits of the program to all prospective participants and continuously reinforce the benefits and success of the program.

Once the program identifies its participants, all participants should be trained in the appropriate role of a mentor and mentee, the structure of the program and the expectations for each participant. In a formal mentorship program, it is important to have specific criteria and processes laid out so that everyone gets value out of the experience.

Then, the process of matching mentors to mentees becomes the critical step to success. The program can allow the mentors and mentees to select one another or the individual running the program can select the appropriate connection based upon the goals and objectives of the mentee and comparing those to the experience and knowledge of the prospective mentors.

Just like any other aspect of business process, the program should create a feedback loop so that the coordinator and senior management can determine whether the program is working to achieve the goals set or whether changes to the program need to be made.

Once the program identifies its participants, all participants should be trained in the appropriate role of a mentor and mentee, the structure of the program and the expectations for each participant.

THE VALUE OF MENTORSHIP

While there are certainly formal mentorship programs as discussed above, most mentorships are created organically. As the old saying goes, a mentorship is created when a mentee chooses their mentor.

In my almost thirty years in business, I never participated as a mentee in a formal program but I always had at least one mentor to learn from. My mentors have run the entire spectrum from older, experienced members of the legal community or the PEO industry to young newcomers that allowed me to see a new way to view things and a unique perspective to solving problems. Some were running large companies, while others were involved in smaller boutique companies. Each brought a unique way of looking at our industry and a wealth of knowledge and experience in how to manage problems.

At all times in my career, whenever I ran into a situation that was new to me or a problem that seemed too big for me to solve, I would pick up the phone and call someone that I respected and admired and ask them if they had ever encountered the same issue and how they managed it. I was always comforted by the fact that almost every time, the issue I experienced was a common problem and there was plenty of experience to share about how to resolve the matter. Those phone calls were the

building blocks to my education and became the bricks upon which I built my business.

I also served as a mentor in an entrepreneur group that was designed to assist business owners that had achieved some level of success and helping them to scale their business. That scenario was a bit different because it was group mentorship rather than one on one mentorship. Over the course of two years, I was mentor to about ten different business owners. We met in groups of five every month and we ran through a very specific agenda that is designed to efficiently get key points of discussion to work through. This program had a very specific format and very specific metrics about each business that each person would be responsible to know and discuss. From there, we could discuss the goals and objectives of each individual and share our collective experience with one another.

It was extremely rewarding for me because I viewed every single person as a success. Some of them grew their businesses to the next level, some realized that they were happy with the level that they had achieved, some exited the business and some people decided that the business was just not the right fit for them, so they found something that made them happier.

The thing that enabled my growth as a PEO owner and executive is the mentors that I identified over time and who were gracious enough to take me under their

wings. My involvement in the PEO industry associations helped facilitate that because where else can you go and get access to so many people who are all engaged in the same business, who all contend with the same types of problems, and who are all working in cooperation to try and solve problems? There is no other place that you can get the entire spectrum of business operators than the industry association.

As I look back at my personal growth in the industry and all of the people that contributed to my development and success, I recognize how important it is for the industry and company leaders today to take responsibility for shaping the leaders of the next generation. We are all potential mentors to someone who is craving growth, either in our industry or in our businesses. We have incredible institutional knowledge that we can impart upon the newcomers and while doing so, there is no doubt in my mind that we will learn from them, as well. ■

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- 2 Natasha Koifman, The Importance of Mentorship, Forbes Online, July 5, 2023.
- 3 Together, How to Start a Mentoring Program: A 5-Step Guide, Citing Dr. Wendy Axelrod.
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ABRAM FINKELSTEIN
Former NAPEO Board Chair
Fort Lauderdale, FL

SUPPORTING THE MODERN WORKFORCE

THE BE LANDS



NEEFITS SCAPE



How PEOs Can Enhance The Employee Benefits Experience To Support A Thriving Workforce

BY RICK PORTERFIELD

For PEOs, a well-executed open enrollment period can be the lynchpin to creating a positive employee benefits experience. While a robust benefits package is crucial for attracting and retaining top talent, these offerings deliver real value only when employees truly understand and use them. Open enrollment provides a key moment to connect with employees and set the tone for their benefits experience in the coming year.

Guardian research demonstrates the impact of this connection: 73% of worksite employees that are highly satisfied with their enrollment experience intend to stay with their employer for at least five more years—yet only 21% of workers feel confident in their benefits selections. This gap presents an opportunity for PEOs to demonstrate greater value by offering a seamless, positive benefits enrollment experience. In doing so, PEOs can help to build a more engaged, satisfied, and loyal workforce. Here's how to begin.

ELEVATING EMPLOYEES' AWARENESS OF BENEFITS

An essential first step for PEOs during enrollment is boosting worksite employee awareness and understanding of available benefits. With 36% of workers spending no time researching

their non-medical benefit options, employees could be missing out on valuable offerings simply due to lack of information or clarity.

PEOs can make a significant impact by enhancing enrollment communications, emphasizing the full suite of available benefits, and highlighting often overlooked yet valuable benefit features.

In some cases, PEOs can look to their carrier partner as a great resource for ready-to-use materials and educational tools. Regardless of the source, however, clear, concise, and accessible materials are key. They could include, for instance:

Benefits at-a-glance infographics.

Use these to visually summarize available options, helping employees quickly grasp the breadth of offerings.

User-friendly enrollment guides.

Provide detailed information and easy-to-read comparison charts to aid decision-making.

Engaging videos and flyers. Each one can delve into specific benefit features, making complex topics more approachable.

By proactively communicating throughout the enrollment period, PEOs can help employees to feel informed, empowered, and ready to make choices that suit their needs.

LEVERAGING TECH FOR A SEAMLESS EXPERIENCE

Once employees understand their options, the next step is making the enrollment and benefits management process as seamless as possible. As the employee benefits landscape becomes increasingly complex, digital tools have become indispensable—particularly for PEOs operating with lean benefits teams.

PEOs can make a real difference here by strategically leveraging innovative benefits technology to enhance the worksite employee experience. For example, new digital solutions, such as application programming interfaces (APIs), can streamline the process, providing efficient, accurate transfer of data to carriers for quick and easy onboarding.

Beyond initial enrollment, benefits technology continues to add value. Modern platforms allow worksite employees to review benefits details, track pay, file claims, and access resources—all in one centralized location. These tools not only simplify benefits administration but also enhance transparency and convenience for employees.

The impact of technology on employee satisfaction is clear: 76% of worksite employees who experienced a highly digitized enrollment process reported high satisfaction, compared to just 39% with primarily paper-based processes and 48% with mixed methods.

For PEOs, investing in such technology frees up valuable time previously dedicated to manual or repetitive tasks. This allows teams to focus more on direct employee engagement—further strengthening their value proposition to worksites.

PUTTING BENEFITS TO USE WITH EASE

Open enrollment is just the beginning. Once the benefits selection period concludes, PEOs can play a critical role in encouraging ongoing utilization of benefits, ensuring employees make the most of what's available to them throughout the year.

Continuous engagement is especially important during times when worksite employees are most likely to need guidance or support. These moments may include key points in the customer experience, such as filing a claim or seeking information about providers, or periods when employees are navigating a major life event like welcoming a new child, changing their marital status, or starting a new job.

To stay connected, PEOs can develop a communications calendar that incorporates these key moments, along with relevant dates such as National Cancer Awareness Month (February), Mental Health Awareness Month (May), and Life Insurance Awareness Month (September).

Maintaining a year-round dialogue—with support from carriers who can provide timely insights and resources—can help to ensure that worksite employees make the most of their benefits all year long.

GETTING STARTED

Delivering a positive employee benefits experience extends far beyond providing a package of meaningful offerings. It's about creating a supportive environment where employees are empowered to make informed decisions, easily access resources, and get the most value from their benefits.

By focusing on clear communication, smart use of technology, and ongoing engagement, PEOs can help worksites



76%

of worksite employees who experienced a highly digitized enrollment process reported high satisfaction

not only boost workforce well-being but also increase retention and loyalty. The window of open enrollment is an ideal starting point, but the positive effects of these efforts continue throughout the year.

For PEOs seeking to solidify and grow their value, there's no better time to step up and make a lasting impact. ■



RICK PORTERFIELD

*Head of Key Markets
Guardian
Wood Dale, IL*

How AI Is Transforming Benefits For HR Teams And Employees Alike

BY DAN THOMPSON

An extended labor shortage, competitive job market and shifting employee expectations have made voluntary benefits no longer a luxury, but a strategic imperative for businesses looking to retain top talent.

Recruitment and retention are still high priorities, especially in today's market—it's a war for talent. The big problem is when small and mid-sized businesses (SMBs) attempt to hire a candidate from a large or medium sized company, the SMB cannot provide competitive benefits. More than ever, SMBs are desiring to offer choices like dental, vision, disability, accident, critical illness, hospital, pet, legal, direct care, college savings plans, 401k and so much more.

For SMBs, managing employee benefits is often a complex and time-consuming process. HR teams juggle manual data entry, paper applications, compliance tracking, employee inquiries, challenging payroll deduction management and open enrollment logistics, all of which drain resources and increase the risk of costly errors.

But a new era is emerging. Artificial intelligence (AI) is helping SMBs reduce administrative workload while also enhancing the employee experience. Here are some of the most powerful ways AI is reshaping benefits administration.

AUTOMATING ENROLLMENT AND ONBOARDING

It's not a surprise that SMBs are still doing paper enrollments. This is a high-margin-of-error and grueling task to any HR leader. Onboarding and enrollment are among the most labor-intensive

HR functions. AI simplifies them by auto-filling forms, syncing with HRIS platforms and validating data in real time. These tools minimize the risk of errors that can lead to compliance issues, guide employees through complex benefit choices, and even detect and process qualifying life events (QLEs) seamlessly. The end result is a far more satisfied, happier employee. Implementing AI into the enrollment process also creates higher adoption, which is a great concept to keep employees retained.

PROVIDING EMPLOYEE SUPPORT

AI-driven chatbots and virtual assistants are transforming how employees access benefits information. Available 24/7, conversational AI delivers personalized support and handles hundreds of inquiries simultaneously. This relieves HR teams of the burden of answering repetitive employee questions one by one. Sample requests include finding an ID card, asking about the status of deductibles or requesting an explanation of benefits (EOB). These efficiencies are priceless.

ENSURING COMPLIANCE

Responsible use of AI is critical, as is compliance. Keeping pace with evolving federal and state regulations is a constant challenge. AI can track legislative changes, perform automated audits and alert HR teams to compliance risks in real time. This capability is especially valuable for SMBs without dedicated legal or compliance departments. This also helps companies avoid fees or penalties associated with late filings or

incorrect submissions. The resulting savings and efficiencies are game-changing for SMBs.

ANALYZING EMPLOYEE SURVEY DATA

Employee surveys are essential for understanding satisfaction with benefits but analyzing them manually is slow and often shallow. AI analyzes both qualitative and quantitative data at scale, uncovering trends and generating actionable reports. It can also highlight underutilized benefits and recommend reallocating resources to higher-value offerings, ensuring packages are both cost-effective and meaningful.

PERSONALIZING THE EMPLOYEE EXPERIENCE

Gone are the days of one-size-fits all benefits packages. Today's workforce expects, and deserves, benefits that reflect their unique needs, lifestyles and life stages as outlined below:

Boomers (age 59-78+) are either approaching or settling into retirement. Their benefit priorities are shifting towards long-term care security, legacy planning and flexible exit strategies that allow them to transition out of the workforce on their own terms. Employers may consider offering benefits such as phased retirement programs, grandparental leave, healthcare navigation support and legacy planning tools.

Gen X (age 44-58) is juggling caring for aging parents, planning for retirement and supporting their children through college. To accommodate, companies may consider offering caregiver leave and support groups, estate planning

workshops, hybrid work flexibility to support Gen Xers' family responsibilities and college savings matching programs.

Millennials (age 28-43) are in their prime working years and, having weathered several global financial crises and conflicts, greatly value work-life balance and financial wellness. Home office stipends, long-term financial coaching, sabbatical programs for tenured employee and fertility or adoption support for Millennials growing their families are all strategic benefit options.

Gen Z (age 18-27) is the newest entrant to the workforce. They are deeply focused on career development and mental health support. As a result, AI-driven mentorship matching, subscription-based wellness platforms, social impact PTO (volunteer days) and gamified performance reviews may all be a good fit for Gen Z.

Ultimately, incorporating AI into benefits administration increases efficiency, reduces operational costs by minimizing manual processes and errors, improves accuracy and compliance, enhances the employee experience and provides businesses with a competitive advantage.

As the workplace continues to evolve, AI will no longer be a "nice to have" in benefits administration, it will be a necessity for businesses looking to thrive. HR leaders who embrace AI will not only relieve their teams of administrative burden, but also deliver a more personalized, meaningful benefits experience that drives retention and engagement for years to come. ■



DAN THOMPSON

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Chandler, AZ*



As the workplace continues to evolve, AI will no longer be a “nice to have” in benefits administration, it will be a necessity for businesses looking to thrive.



FINANCIAL FRONTLINE

AL INES

THE NEW COMPETITIVE EDGE

PEOs and the Fight for Workforce Integrity

BY ELI POLANCO AND OYE FAJOBI

Workforce compliance, a vital and complex function for new and small businesses, is facing a novel form of risk. While PEOs have long been the trusted experts in this space, a sophisticated cyber threat has emerged where organized criminals are leveraging a “phantom workforce” to infiltrate companies and divert millions of dollars.

Recent headlines, in which a single fraud ring generated \$17M in illicit wages from 300 victim companies, are just the tipping point. Behind the scenes, long-standing and rapidly expanding schemes begin with fraudsters targeting US companies using stolen identities to obtain employment illegally—often blending real Social Security numbers with fabricated names and credentials. Once employed, these phantom workers launder paychecks back to their organizers, bypassing traditional controls.

New and smaller companies without dedicated security teams and financial reserves are especially vulnerable—a single incident can quickly balloon from financial loss to a battle for the company’s survival, creating costly legal and regulatory exposure. One in three SMBs faced a cyberattack in the past year, with average losses of \$254K and some exceeding \$7M, according to Microsoft’s Security SMB Vulnerabilities report. Luckily, PEOs are uniquely positioned to protect these businesses.

Managing workforce risk across hundreds or thousands of clients, PEOs have the scale, expertise, and technology to respond proactively.

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My best advice? Go PRO."

— Jason Willborn, President & Partner, SustainableHR PEO



Jason Willborn

President & Partner,
SustainableHR PEO



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That's why PEOs matter more than ever. By integrating onboarding, payroll, compliance, and risk, PEOs centralize oversight and can detect patterns that would elude individual employers.

REMOTE WORK AND DIGITAL ONBOARDING

While remote work and digital onboarding have brought unprecedented flexibility and reach to growing businesses, they have also created new entry points for fraud. Systems designed for in-person verification now handle candidates who may be continents away, making it harder to spot impostors.

For small businesses, the drive to fill roles quickly often means online hiring moves faster than security checks, leaving gaps that today's cybercriminals know how to exploit. The result is a strategic vulnerability that opens the door to this phantom worker payroll fraud, demanding fresh approaches from PEOs and their clients. As more companies move to decentralized teams and remote-first models, these schemes have only proliferated.

THE SYNTHETIC WORKFORCE THREAT

Imagine running a small business and being strapped for time, trying to fill a critical IT or operations role. You post a remote job, receive impressive resumes, interview a U.S. candidate over video, and—without a physical office—hire the best fit whose documents check out. Months later, law enforcement arrives: more than \$100,000 in payroll has been funneled overseas, IRS questions are piling up over stolen identities, and your company's sensitive data is at risk. Only then do you discover your “employee” never existed—a pawn in a global, highly organized payroll fraud ring.

Government investigations confirm that thousands of North Korean IT workers are active in every state, using deepfake documents, “laptop farms,”

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and stolen credentials to impersonate U.S. employees and contractors. Experts highlight the scale: Up to 90% of U.S. tech job postings are estimated to encounter these actors as they blend into remote teams and pass digital checks.

Nation-state handlers pressure these workers, who are sometimes forced to meet quotas as high as \$20,000 per month under threat of harsh punishment or forced labor. The national financial impact is staggering, with U.S. organizations losing more than \$600 million so far.

Fraudulent hires are embedded, running regular schedules, appearing in Slack and project management tools, delivering plausible work output, and quietly siphoning funds for months. Most small and mid-sized employers, relying on fragmented onboarding or payroll systems, are unlikely to spot these anomalies before the damage is done.

That's why PEOs matter more than ever. By integrating onboarding, payroll, compliance, and risk, PEOs centralize oversight and can detect patterns that would elude individual employers. When suspicious credentials or direct deposit changes appear, PEOs can investigate early, often preventing financial loss or regulatory disaster. Yet even for industry leaders, the threat persists: Paychex reports that about 10% of the 500,000 bank account change requests they review annually are flagged as fraudulent.

Fragmented, disconnected systems are a playground for sophisticated fraudsters—industry analysis confirms these actors thrive wherever payroll, HR, and banking systems don't communicate. Centralized insight is the proactive shield companies need to confront the phantom workforce threat.

IS YOUR PEO READY TO LEAD?

PEOs can empower clients to take real action against payroll fraud. Ask these questions to assess whether your PEO is truly ready to seize the opportunity and deliver trust in the age of synthetic payroll risk:

System Integration & Cohesion

- Does our system connect payroll, HR, banking, and risk management for end-to-end visibility and control from onboarding to separation?
- Are red flags—like inconsistent employment data—shared instantly across departments and flagged for action?

- Do we maintain master records that allow us to monitor discrepancies throughout employment, not just at onboarding?

Transaction-Level & Independent Verifications

- Do we use transaction-level monitoring for anomalies in payroll or benefits, catching issues in real time rather than after the fact?
- Are independent, multi-factor identity and HRIS vs banking ownership checks required—not just at hire, but on every direct deposit change?
- Can our systems automatically flag and halt payments to suspicious accounts, such as those owned by unrelated entities?
- Are we verifying physical presence or work location when possible, and running extra checks for remote roles as recommended by consultants?

Other Enabling Actions

- Are clients and staff regularly educated about new fraud tactics, including recognizing urgent or unexpected requests for account changes?
- Are audit trails thorough and available for every payout action, enabling fast investigations and strong accountability?
- Do we continuously review and adapt our risk posture, positioning our PEO as a trusted security champion?

It's worth noting that nearly half of the 300 companies affected by recent synthetic payroll attacks engaged hiring help through employment management services and platforms that failed to enforce workforce integrity. For PEOs, the opportunity is clear: taking decisive steps not only protects clients but also sets your firm apart from competitors as a proactive leader. ■



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MEET BILL MANESS:

NAPEO'S 2025-2026 BOARD CHAIR

Bill Maness is the founder and CEO of Syndeo, the only Wichita, Kansas-based PEO. He's been an active member of NAPEO since joining the industry nearly three decades ago. This October he takes the reins as chair of NAPEO's board of directors. He recently spoke with *PEO Insider®* to share a bit about his background and vision for NAPEO.

PEO INSIDER®: HOW DID YOU FIRST ENCOUNTER THE PEO INDUSTRY? WHAT WERE YOUR IMPRESSIONS?

Bill Maness: I was in the radio advertising business, and radio stations were going through a massive wave of mergers and acquisitions which is kind of an interesting parallel to PEOs today. I found that I could not hold my future in my hands, and it scared me that my destiny was being determined by someone else. I didn't like that, so I put the word out I was interested in doing something different.

Another radio rep said her husband in the staffing business was looking for a sales person for a new concept they wanted to roll out. I met with him, and he introduced me to PEO which was like a foreign language to me at the time. But once he started talking about what a PEO did, I remember thinking "why wouldn't every business use this?"

I realized that the world is our oyster, since I had a local small business client base and no one else was selling PEO in Wichita. After about a year the company was acquired by another firm, and I remained with that firm for about three years before starting my own PEO in 2002.

PI: WHAT ATTRACTED YOU TO THE PEO INDUSTRY?

BM: I was attracted to the idea I could help small businesses do what they do better and take all the administrative burden off their plates. Having been an entrepreneur, I had experienced this myself and knew I didn't like it.

Creating a business from scratch is really, really hard. I had been through that experience, so starting a PEO was more comfortable because I just had to build my own business with the existing industry infrastructure. I was the only shop in town, so bringing a new concept to a new market was an attractive opportunity.

PI: HOW DO YOU THINK THE INDUSTRY WILL EVOLVE OVER THE NEXT FEW YEARS?

BM: I think that we have graduated from being product driven to now being service and technology driven PEOs. The next evolution of the business model is about embracing AI and also mastering the regulations that come around AI. These regulations will constantly evolve and we, as employers, must be at the forefront.

The consolidation of the industry over the last five years will mirror what I saw in the radio business and the banking business 25 years ago. Eventually, what spawns off all the mergers is a community of people looking for a small, local business. A whole industry of community banks emerged after all the large banks acquired one another. Customers sought community-oriented businesses and wanted a choice to get a big box player or a local business.

We're seeing new PEOs form with leaders who are on their second or third PEOs. I see a wave of small, local-focused PEOs cropping up on the horizon. It's good for the industry because it holds everyone accountable by increasing competition. It also helps our market share grow.

Instead of having to begin each conversation with 'what is a PEO', the conversation now begins with "well I want this, but better or different." More choices mean more market share for all of us.

I'm not adverse to competition. A rising tide lifts all boats. I'd love to see PEOs entering underserved markets. No matter how you chose to deliver your products or services, the business model is so good everyone will benefit from having more PEOs and more representation.



PI: WHY DID YOU INITIALLY JOIN NAPEO AND SEEK TO GET INVOLVED?

BM: My first day on the job in PEO was attending the NAPEO conference in San Francisco. I had a sales training meeting and spent the entire time learning about PEOs and meeting other members in the industry. I was surprised that everyone was helpful and collaborative. I thought I just needed to get to know everyone and then ask questions. It's human nature to want to help someone. Everyone involved in this industry wants to help each other learn and grow. It's never failed me, and it's why I've stayed involved with NAPEO.

I've always had a long list of people I could turn to for help.

PI: HOW DO YOU SEE YOUR ROLE AS CHAIR?

BM: I see the chair as the leader of the NAPEO agenda and the chief cheerleader of getting everyone involved in our cause. We have many new ways to get involved like NextGen and WIN. I want to help these programs grow and raise the expectations of how they can help further our industry. I want to put NAPEO Gives Back on steroids to get everyone to see how they can give back in their own

communities. I want to encourage that even more. Lastly, I want to raise our game when it comes to political influence in Washington and in the states. This includes growing and expanding our PAC.

I'm not introducing anything new. One of my biggest strengths is taking something that already works and making it better. It's what I've done with my business and what I hope to do with NAPEO.

I see my leadership as driving everything to go bigger, better and faster. I want to encourage excellence in everything we do and raise the bar.

Greg Marshall, a former Wichita State basketball coach, once said, "sometimes in the pursuit of perfection you have to settle for excellence."

It's the pursuit of perfection that will makes us better. Let's not just settle for what is.

PI: WHAT IS YOUR MAIN PRIORITY OR GOAL FOR THE UPCOMING YEAR?

BM: My two main priorities are to continue the good work of past chairs to develop the next generation of NAPEO leadership and to solve the issue of consolidation and its effect on NAPEO's revenue. It's an issue we need to solve. I plan on convening everyone together to examine the issue and seeking input from everyone. It's going to require a lot of participation, but at the end of the day we need to deal with it.

PI: OUTSIDE OF PEOs WHAT ARE YOUR INTERESTS/PASSIONS/HOBBIES?

BM: When I got involved with NAPEO leadership, I was in several other organizations, but now I'm at a point where I have time to support only one organization and that's NAPEO.

I'm also an avid golfer with only two goals left: making a hole-in-one and shooting my age. That's really my passion outside of work. I also love the challenge and social aspect of playing poker, and recently I've taken up furniture making like picnic tables, nightstands, and bedframes. ■

STEP INTO WELLNESS: THE THIRD ANNUAL EVERY STEP COUNTS 5K RETURNS THIS OCTOBER

BY DEBORAH BROUSSEAU

This October, Landrum is proud to host its Third Annual Every Step Counts 5K Run/Walk, a community-driven event that celebrates movement, mental wellness, and meaningful connection. What began as a simple initiative to promote physical activity has become a powerful tradition that brings together individuals, families, and organizations across the Gulf Coast of Florida. Giving back to the communities

they serve nationwide has always been at the heart of Landrum's people-first focus, and this event is one more way they bring that mission to life.

MORE THAN A RACE

The Every Step Counts 5K is not just about crossing the finish line, it's about making a difference in the community. Proceeds from the event benefit Lakeview Center, a non-profit organization that provides behavioral health services to

children and adults in the Pensacola community. By registering and lacing up their sneakers, participants become part of something much bigger than a Saturday morning run/walk. They are supporting programs that help people heal, grow, and thrive.

For Landrum CEO Britt Landrum, III, the connection between physical and mental health is personal and profound. "When we take care of our bodies, we're also taking care of our minds," he says. "This event is a celebration of that link, and a reminder that every step we take toward wellness is a step toward a stronger, healthier community."

This year's race takes place on Saturday, October 11, with an 8 am start. In addition to supporting a meaningful cause, registrants receive a commemorative t-shirt and a medal for crossing the finish line.

WHY IT MATTERS

The Every Step Counts 5K is as much about community as it is about wellness. Events like these give neighbors the chance to come together, support an important cause, and share in the uplifting energy of movement and togetherness. For some, the run may be about achieving a personal fitness goal. For others, it may be about supporting a loved one who has benefited from Lakeview Center's services. And for many, it's simply about showing up, making connections, and reminding ourselves that we're stronger together.

The funds raised through the 5K have a tangible impact, from helping children access counseling to enabling adults to receive treatment for substance use disorders to providing ongoing support for families navigating mental health challenges.

A TRADITION OF WELLNESS AND GIVING

Landrum believes that a mentally and physically well workforce is in everyone's best interest. When employees feel supported in their mental and physical

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Over the past two years, the Every Step Counts 5K has grown into a beloved local tradition. Participants return year after year, bringing friends, colleagues, and family members to experience the joy of giving back while prioritizing their own wellness. The event reflects Landrum's longstanding belief that when businesses and communities invest in people, everyone benefits. ■



DEBORAH BROUSSEAU

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TRUMP'S \$100,000 H-1B VISA FEE: WHAT IT MEANS FOR PEOs

BY JOHN POLSON, ESQ. AND SHANON STEVENSON, ESQ.

The Trump administration upended the immigration and workforce strategy for many tech employers and other businesses when it announced that it would begin charging a \$100,000 entry fee for each H-1B visa recipient. After a few hours of confusion, the administration clarified that, beginning September 21, employers must submit the \$100,000 payment to accompany or supplement H-1B petitions only for new applications.

While there is still some confusion around the specifics of President Trump's proclamation and those affected, the good news is that this move will not impact existing H-1B visa holders and should not force all foreign national workers to immediately rush back to the U.S. Still, for PEOs and their customers, the implications are significant, particularly for PEOs with a heavy concentration of customers in the technology sector.

WHAT ARE H-1B VISAS?

The H-1B visa program is a non-immigrant category that allows U.S. employers to hire foreign workers in specialty occupations requiring highly specialized knowledge:

- Each applicant must be sponsored by a U.S. employer and have at least a bachelor's degree or equivalent.
- Recipients are initially approved for up to three years, with extensions available up to six years.
- About 85,000 new H-1B visas are available each year (not including universities, which are exempt from the cap). In 2025, employers submitted roughly 425,000 petitions, and the government ran its annual lottery to award visas.
- H-1Bs are common in the technology, engineering, and healthcare sectors—industries that rely heavily on global talent.

WHAT WAS THE TYPICAL COST OF H-1BS?

Before this proclamation, government fees for H-1Bs were predictable. Employers would submit a \$215 registration fee for the lottery, a \$780 petition fee, and roughly \$1,800 to \$2,600 in additional charges. While significant, these costs were manageable for both large and small companies.

With the new \$100,000 fee, the economics change dramatically. For smaller employers—many of whom partner with PEOs for HR and compliance—the barrier may now feel insurmountable.

WHAT DID TRUMP ANNOUNCE?

According to the proclamation, the Trump administration is seeking to curb abuses of the H-1B system that may disadvantage U.S. workers or suppress wages. Key points include:

- The \$100,000 payment is a one-time fee tied to new H-1B petitions, not renewals.
- It applies beginning September 21, 2025, and will affect the FY2027 H-1B cap lottery in March 2026.
- It will not apply to petitions filed in the FY2026 lottery earlier this year.
- Exemptions may be granted if the Department of Homeland Security (DHS) determines a petition is in the national interest.

For PEOs, this means they must be ready to explain to clients which petitions are affected and help them weigh whether sponsoring new candidates remains a viable option.

WILL THIS MOVE IMPACT EXISTING H-1B HOLDERS?

No. A September 20 USCIS memo confirmed the policy applies only to new petitions filed on or after September 21. Current visa holders can continue

traveling in and out of the U.S. without concern.

This is an important point for PEOs advising clients with existing H-1B employees: current staff are secure, but future hiring strategies must adapt.

ARE THERE EXCEPTIONS?

A statement from the White House said that certain professionals, including physicians, could be exempt from this fee.

WHAT SHOULD PEOs DO NOW?

Monitor Clarifications: More guidance is expected. PEOs should keep clients updated with timely alerts and webinars explaining the latest developments.

Communicate with Affected Employees: Employers should reassure current H-1B staff that their status is not at risk.

Assess Travel and Compliance

Risks: Employers must review travel plans of H-1B employees and stay on top of documentation requirements.

Explore Alternatives: With \$100,000 fees on the horizon, employers may need to consider other visa categories (O-1, L-1, F-1/OPT), sponsoring H-1Bs for permanent residence to provide a more stable status, or even remote international employment.

Engage Legal Counsel: Both PEOs and their clients should work closely with immigration attorneys to ensure compliance and mitigate risk.

For PEOs, the impact of these new policies will vary depending on their customer base and the services they provide. PEOs that provide guidance to customers on corporate immigration will feel the impact immediately. Some PEOs may feel that impact less and instead see an

impact on worksite employee headcount over the course of next year. For some PEOs it will impact their efforts to fill internal technology positions. ■



This article is designed to give general and timely information about the subjects covered. It is not intended as legal advice or assistance with individual problems. Readers should consult competent counsel of their own choosing about how the matters relate to their own affairs.



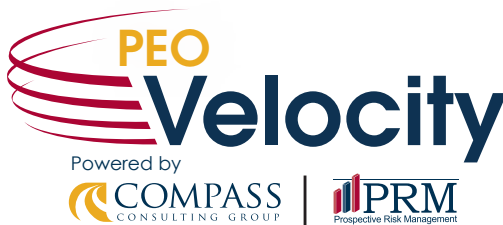
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BUILDING A CULTURE THAT STANDS OUT ABOVE THE REST

BY PAT MURPHY

Every successful team has something unique—a secret sauce—that makes it stand out above the rest.

In the sports world, we can turn to the court or field for examples. The Indiana Pacers made an impressive (and perhaps unexpected) run through the NBA playoffs this year thanks to a determined group of players—rather than one mega superstar—that bought into a team-first culture and thrived in part because of a strong trust their coach cultivated.

The dominant Alabama football teams that won six national championships in 11 years between 2009–2020 were known for their focus on process over results, preparation, discipline, and the development of mutual respect between the coaching staff and the players.

A supportive, family-first environment fueled by respect and open communication drove the San Antonio Spurs during a period of sustained excellence under coach Greg Popovich in the 2000s and early 2010s.

The secret sauce for each of these teams was instrumental in laying the foundation and maintaining a culture that helped their players and teams reach their potential and the highest levels within their respective sports.

At G&A, we have an undeniable secret sauce that brings out the best in our employees. It's a mixture of valued feedback, shared passions, and a strong culture developed through consistent leadership for 30 years. And it's enabled us to grow at a relentless rate—G&A recently earned a record-breaking 20th recognition on the prestigious Inc. 5000

list of fastest-growing private companies in America.

Our recipe includes:

Valuing employee (and client)

feedback. Asking our employees to give us feedback regularly and providing an anonymous method to do so gives our workforce the opportunity to express their ideas, thoughts, and opinions. It also gives our executive team an understanding of where our workforce is. We believe happy employees provide better experiences for our clients, and consistently measuring how our employees feel gives us a clearer picture of where we are as an organization.

Evaluating and acting on feedback.

How we respond to our employees' voices is arguably more important than asking for their feedback. At G&A, we value each and every response we receive to our employee and client surveys. Again, anonymity is an important component of our employee surveys, so executives don't know who provided the feedback they review. Our executive team regularly dedicates time to evaluate employee responses, identify potential problems, and determine how to address them.

Being transparent with our

workforce. Some employee feedback is easy to address; other responses may be more complex. We're transparent with our employees. If we can't address an issue, we'll explain why and, when possible, offer an alternative solution. If we can, we'll let our employees know that a change is a direct result of their feedback. We want our team to know that we value their feedback, and whenever possible, we'll act upon it.

Growing with intention.

Part of our mission is to help build thriving businesses, and that starts within G&A. As we continue to grow and evolve as a PEO, we're committed to fostering the same environment of success, support, and opportunity for our own team that we strive to create for our clients.

That means taking an intentional approach when we acquire companies and bring their employees into G&A. Our goal is to retain as many of the seller's employees as possible. When we cannot, we provide outplacement services to help them land softly. Today, 25% of our workforce comes from the companies we've acquired in the last five years.

Approaching each day with a shared passion. At G&A, our employees come to work each day with an unmatched level of commitment to their clients and colleagues. Magic happens when employees care so much about their colleagues and clients and wake up every day with the intent to make G&A a better place.

A strong culture doesn't happen by chance; it's built on a foundation of trust, transparency, and a shared

purpose. Just like the best sports teams, a successful organization has a mission and a set of core values that guide every decision and action.

At G&A Partners, valuing feedback, acting with transparency, and fostering a shared passion—all part of our secret sauce—are keys to our continued growth and success. By investing in our people and cultivating a culture where they feel heard and valued, we not only improve our own organization but also strengthen our ability to help our clients achieve their own goals. ■



PAT MURPHY

Chief Financial Officer
G&A Partners
Houston, TX



A strong culture doesn't happen by chance; it's built on a foundation of trust, transparency, and a shared purpose. Just like the best sports teams, a successful organization has a mission and a set of core values that guide every decision and action.

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THE BEST BENEFITS FOR A MULTIGENERATIONAL WORKFORCE IN 2025

BY ALEXA VANDEVALK

It's no secret that most of today's workforce is checked out. According to Gallup's 2025 report, only 31% feel engaged. Outdated benefits are a big reason why. When employees don't see value in their benefits, they disengage, pick up second jobs or leave for better offers.

We surveyed 327 employees across 8 industries ranging from healthcare to quick service restaurants for our ZayZoon's Top Benefits Report and 91% said that benefits are important or very important in their decision to accept a job.

For PEOs, this creates both risk and opportunity. Standard, one-size-fits-all packages no longer meet workforce expectations. If your offerings don't evolve, you risk diminishing your value to clients and falling behind competitors.

In this article, we'll break down the benefits employees across generations value most in 2025—and how you can help clients deliver them.

FLEXIBILITY AND TIME

Flexibility and work-life-balance now outranks salary as a top reason people

choose and stay at a job in 2025. Paid Time Off (PTO) and hybrid or remote work tied for most important benefits for today's employees, with 25% of employees ranking each as their number one benefit. Nearly half said they would take a 5% pay cut for more flexibility.



Recognition fuels engagement across age groups. ZayZoon's Motivating and retaining Gen Z report found that half of Gen Z employees don't feel heard or valued.

For Gen Z, flexibility is the baseline. PEOs can help clients stay competitive by offering benefits that make flexibility real for all generations. Clear PTO programs, hybrid or remote options, commuter

support and simple and unified access to all benefits.

HEALTH AND WELLNESS

Wellness now sits at the heart of retention strategies. Yet many benefit packages still fall short. 85% percent of employees say mental health support is important, but many employers still underdeliver.

What health and wellness benefits makes employees stay looks different across generation, Payroll Integration's Employee Benefits Trends for 2025 report states what each generation prioritizes:

Baby Boomers: Comprehensive health coverage and prescription drug benefits

Gen X: Preventive care, mental health services and family healthcare plans

Millennials: Telehealth options, wellness programs, and cost-effective solutions

Gen Z: Digital-first healthcare, mental health support and flexible spending accounts

Across generations, wellness perks like gym memberships, HSAs and everyday savings on prescriptions, groceries and insurance reduce stress and boost loyalty.

FINANCIAL BENEFITS

Financial stress looks different across generations. A Gen Z worker might be juggling student loans and cash flow between paychecks. A Gen X parent might be saving for college while caring for aging parents. If benefits don't meet those real needs, employees feel unsupported and start looking elsewhere.

Financial wellness is now a baseline expectation—not a bonus. That means offering:

Earned wage access (EWA): 82% of Gen Z want it. Employers offering it report better morale (67%) and productivity (74%) across generations

Discounts and perks: Savings on everyday expenses help employees stretch their income

Financial education: Budgeting, credit, and investing tools reduce stress and allow employees to remain focused at work

"The traditional focus on financial wellness, which was almost exclusively around the 401(k) plan, it's just not sufficient anymore. Our employees are asking for help with all aspects of their financial life," said Kevin Cammarata, Vice President of benefits at Verizon to CNBC.

Offering a mix of short-term relief and long-term planning tools helps clients improve retention and keep employees focused.

REWARDS AND RECOGNITION

Recognition fuels engagement across age groups. ZayZoon's Motivating and retaining Gen Z report found that half of Gen Z employees don't feel heard or valued. That gap matters for everyone, employees of all ages who receive recognition are 20x more likely to be engaged.

Recognition programs give PEOs a simple way to help clients keep employees

motivated. Scalable tools like instant shoutouts, gift cards and peer-to-peer recognition feeds make it easy for clients to show employee appreciation in real time.

The payoff is clear:

Morale: Employees are 18x more likely to produce great work if they are recognized

Attendance: Doubling recognized employees cuts absenteeism by 22% per year

Retention: Employees who are not regularly recognized are twice as likely to leave within a year

FAMILY AND LIFESTYLE SUPPORT

Employees don't leave their personal lives at the door, and benefits that acknowledge that reality make a difference. Childcare assistance ranks third among employee priorities, 86% of employees with children more likely to stay if their employer offers it.

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HR, EMPLOYMENT, & BENEFITS

Pet insurance is another growing request, with 12% of employees naming it as a desired benefit. These lifestyle perks signal empathy and help clients stand out as modern employers. The diverse range of different family and lifestyle support engages all generations.

PROFESSIONAL DEVELOPMENT

Employees of all ages want growth on their own terms. Some prefer brushing up on core skills, others want management training and many look for new certifications or digital tools to stay ahead. A blended approach makes this possible.

When people feel they're building the skills they care about, whether that means a Boomer refreshing expertise, a Gen X manager stepping into leadership, a Millennial mapping a career path or a Gen Z employee learning continuously,

they are far more likely to stay and grow with the company.

When you give employees choice in how they grow, you make it easier for clients to keep their best people of all ages and prepare their teams for what's next.

KEY ACTION ITEMS

The most effective PEO benefits strategies involve active employee engagement rather than passive benefit administration. Today's workforce expects employers to take an active role in their wellbeing rather than the same old benefits offering and hoping for the best. Here is how you can take that active role:

Regular pulse surveys: Capture evolving preferences better than annual surveys, as life circumstances change frequently

Avoid platform fatigue: Employees get lost when every benefit requires a

separate login—43% of people reporting excessive time switching between applications. Find offerings that bundle multiple benefits into one login. A single, mobile-friendly hub makes it easier for employees to engage. The easier benefits are to use, the more they drive retention.

Remember: the goal isn't treating every generation identically, but ensuring every employee accesses benefits that meaningfully impact their lives. That's how you build truly inclusive client offerings that drive retention and engagement across all generations. ■



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If you have any questions about this event, please contact Robin Schlesinger, rschlesinger@napeo.org.

BUILDING A RESILIENT WORKFORCE THROUGH COMPREHENSIVE SCREENING

BY MIKE BANKHEAD

Building a thriving organization rests on a solid foundation, which should include comprehensive workforce screening. Far from a simple administrative step, robust background screening, and where applicable, drug and occupational health screening, is a fundamental pillar of human capital strategy. It impacts talent acquisition and retention, the management of diverse workforces, and the agile integration of freelance talent. This article explores how intelligent screening builds a secure, productive, and flourishing organizational ecosystem by mitigating risks.

OPTIMIZE TALENT ACQUISITION & RETENTION

Finding exceptional talent is crucial to an organization's success. Comprehensive screening ensures only qualified,

trustworthy individuals join your team. Careful verification of credentials, work histories, and criminal records helps prevent negligent hiring risks like financial loss, legal issues, reputation harm, and declining morale. Rigorous screening enables confident onboarding, aligning skills and integrity with your standards from day one.

Retention also improves in a safe and ethical environment; when employees know colleagues are thoroughly vetted, trust and morale grow while workplace friction drops. Ongoing screening for roles with certification needs further ensures compliance, minimizes legal exposure, and upholds operational excellence.

CULTIVATE A CULTURE OF ACCOUNTABILITY

Professional screening protocols clearly communicate an organization's values,

including honesty, integrity, and safety. From the start, prospective employees understand that foundational standards must be met. This transparency fosters accountability, as individuals are aware that their conduct will be reviewed, setting clear expectations and promoting high standards.

For existing employees, knowing peers undergo rigorous vetting creates fairness and equity, reinforcing that all are held to the same standards, fostering a cohesive environment. This also deters undesirable behaviors, as employees recognize potential consequences. Comprehensive screening builds robust, trust-based employer to employee relationships.

PROTECT WHAT MATTERS MOST

Strategic screening is essential for protecting your organization's most

valuable assets: your people, your clients, and your intellectual property. For sensitive roles, rigorous screening is not just a regulatory requirement; it shields your business from risks like fraud, embezzlement, and abuse.

Your company's reputation is irreplaceable. Just one incident involving an unscreened hire can jeopardize public trust and result in real financial loss. Proactive background checks are a vital safeguard, preserving your brand image and reinforcing confidence among your customers and partners. Comprehensive screening is a cornerstone of responsible business, helping you maintain the reputation you've worked hard to build.

SEAMLESSLY MANAGE DIVERSE WORKFORCES

Modern workforces often comprise multiple generations with distinct values. Effectively managing this diversity requires understanding varied perspectives while upholding consistent professional standards. Screening plays a crucial unifying role. All candidates, regardless of age, undergo the same vetting, ensuring a universal baseline of trustworthiness. This equitable application mitigates biases and fosters fairness across all age groups.

For established generations, robust screening provides reassurance regarding security. For younger generations, transparent screening policies are comforting, demonstrating commitment to a safe and secure environment. Consistent application of screening across all demographics reinforces fair treatment, fostering a harmonious and productive workplace.

MASTER THE GIG ECONOMY

The gig economy's growth and reliance on freelance and contract workers introduce unique complexities. While flexible arrangements offer agility and

specialized skills, their transient nature demands extended due diligence.

Organizations using gig workers must expand screening protocols to include these external collaborators. This involves rigorous identity verification, criminal record checks, and professional conduct assessments, especially for roles with client interaction, proprietary information access, or brand representation. Failing to vet freelancers exposes companies to the same risks as unvetted full-time employees, including reputational damage and legal liabilities. For companies leveraging the gig economy while managing risk, a comprehensive screening approach for all contributors is essential.



Strategic screening is essential for protecting your organization's most valuable assets: your people, your clients, and your intellectual property.

FINDING THE RIGHT PARTNER

Navigating workforce screening complexities takes more than just a vendor; it takes a trusted partner. The right partner should deliver integrated background, drug, and occupational health screening services that are customized for your organization's unique needs, so you can focus on what matters most.

When evaluating potential partners, look for these key factors.

Compliance & Accreditation: Seek a partner that is a member of the

Professional Background Screening Association (PBSA) and is nationally accredited C/TPA (Consortium/Third-Party Administrator) for drug and alcohol screening. Ensure their staff is FCRA-certified and their compliance team, guided by legal experts, proactively monitors regulatory changes.

Integrated Services & Solutions:

Choose a partner that streamlines your process by offering a full suite of services, including background checks, drug testing, and other occupational health services, all in one place.

Technology & Security: Evaluate their platform for an intuitive, mobile-friendly experience with seamless integrations to your HCM system. The partner should have certifications like SOC 2 to ensure data security.

Concierge-Level Client Service:

Select a partner with a dedicated U.S.-based support team that offers a responsive, personalized, and transparent experience for your team and candidates.

Accuracy & Speed: Find a partner that balances cutting-edge technology with meticulous quality controls to provide fast and reliable results, helping you move candidates through the hiring process quickly.

The right partner should be more than a provider; they should operate as an extension of your HR, security, and risk management teams. A holistic approach that blends advanced technology, deep expertise, and a commitment to exceptional client service that will empower your organization to build robust, compliant, and efficient screening programs. ■



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3 STRATEGIES TO INTEGRATE EOR IN YOUR PEO'S GO-TO-MARKET STRATEGY

BY EZRA SCHNEIER

The PEO sector is evolving. Traditional sales and marketing methods can't keep up with today's competition, nuanced client expectations, and business complexities.

PEOs do more than just HR and administrative services. They need to show strategic value by helping clients manage global expansion and by supporting the entire international employee lifecycle. This means adopting an integrated PEO and employer of record (EOR) strategy that strengthens domestic operations while simultaneously paving the way for global growth.

There are three core sales and marketing strategies PEOs can use to support domestic value and position themselves as valuable partners for clients with international ventures.

1. PERSONALIZE ENGAGEMENT FOR GLOBAL GROWTH

Small and medium-sized businesses (SMBs) need specialized solutions for their local and global challenges. PEOs thrive when they embrace personalization to support clients' international growth and entire global employee lifecycle.

Personalization starts with:

Deep presale research: Equip your sales team with insights into a prospect's global footprint, information about specific countries, and an awareness of international HR pain points. Understand market nuances and how EOR partnerships enhance PEO offerings.

Value-driven discovery: Focus calls on global expansion challenges. Insights gained during discovery are marketing goldmines that directly inform marketing and sales collateral.

Custom proposals: Detail solutions for local and global challenges to optimize international payroll and benefits with a single PEO-EOR solution.

Sales-fueled content: Create global expansion content (whitepapers, case studies, etc.) directly from your sales insights. Make sure the content is calibrated to the client's needs to drive sales.

Businesses turn to personalization to unlock growth. DevonWay, a leading provider of asset, quality, safety, and work management software, used an integrated global employment solution to manage international employee relocation and compliance. By adopting

a PEO-EOR strategy, DevonWay grew globally without the hassle of setting up a local entity.

2. EMPOWER TEAMS WITH GLOBAL SALES ENABLEMENT

Teams need the right tools and resources to succeed in the global marketplace. PEOs that sell international hiring services will need extensive knowledge of the employee lifecycle.

To empower teams, focus on:

Centralized global knowledge: A platform for domestic and international compliance, sales playbooks, and cross-border FAQs (including EOR partner insights).

Ongoing global training: Regular workshops on global labor laws, international sales techniques, and EOR offerings.

Dynamic global assets: Tools like templates, international expansion case studies, and presentations showing PEO-EOR solutions that manage the global employee lifecycle.

Cross-functional global alignment: Collaboration among internal experts and EOR partners provides holistic support and a cohesive message for global solutions.

Equip your teams with these global resources to accelerate sales, offer accurate client counseling, and position yourself as trusted advisors for international complexities.

3. ENSURE COMPLIANCE, EVERY STEP OF THE WAY

Clients worry about labor laws, cybersecurity, and liability. EORs are invaluable for international compliance. Position your PEO as a complete global compliance solution to expand your offerings across the entire employee lifecycle.

Tailor compliance services for global sales with:

Proven cross-border monitoring:

Show how your PEO stays on top of local and international labor laws. Highlight EOR partnerships that adhere to diverse global regulations—from contracts to termination.

Global liability mitigation: Educate clients on how EOR partnerships mitigate risks in international hiring. Mitigation includes compliance with international tax laws, social security, and local employment standards.

Data security leadership: Position your organization as a data security leader. Emphasize how certifications (like SOC 2) and other protocols apply to international employee data managed with EOR partnerships.

Effective compliance expertise isn't just operational—it's a differentiator that builds trust, mitigates risks, and strengthens client relationships.

EORS INCREASE PEO SCOPE

PEOs excel domestically, and EORs unlock global access. Partner with an EOR to expand your offerings and support your clients' international hiring goals.

EORs handle the complexities so PEOs can deliver global solutions, empower teams, and use compliance as a world-wide advantage.

The PEO market grows more complex every day. PEOs that focus on personalization, sales enablement, and compliance expertise will become indispensable to clients. You can strengthen your clients' domestic position and build a foundation for global growth. A partnership between a PEO and an EOR positions you for long-term growth, relevance, and increased client trust in a market that demands global workforce solutions. ■



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REPOSITIONING THE PEO VALUE PROPOSITION: FROM OPERATIONAL SUPPORT TO STRATEGIC GROWTH

BY CHAD PARODI

As PEO professionals, we know the value our services bring to clients: streamlined HR operations, compliance support, and access to competitive benefits. But as the business landscape evolves, so must our positioning. The time has come to move beyond the traditional outsourcing narrative and present PEOs as strategic growth partners that help businesses scale, compete, and thrive.

WHY THE TRADITIONAL NARRATIVE FALLS SHORT

For years, the PEO value proposition has centered on relieving administrative burden and reducing risk. While these are foundational benefits, they don't reflect the full strategic potential of a PEO relationship. First, when we lead with cost savings and compliance, we risk being seen as tactical vendors rather than growth enablers. Second, this framing limits our influence in strategic conversations. Business leaders are increasingly focused on agility, talent strategy, and long-term scalability—areas where PEOs can and do deliver measurable impact.

ELEVATING THE CONVERSATION: PEOs AS GROWTH ENABLERS

To reposition effectively, we must highlight how PEOs contribute to business growth in tangible ways:

Talent optimization: PEOs help clients attract, develop, and retain top talent through better benefits, onboarding support, and workforce planning.

Revenue alignment: By freeing up leadership bandwidth and aligning HR strategy with business goals, PEOs enable clients to focus on growth-driving initiatives.

Operational leverage: Our scale and expertise allow clients to optimize costs while improving service delivery and employee experience.

Risk management as strategy: Compliance isn't just about avoiding penalties—it's about protecting brand reputation and supporting confident expansion.



These are strategic outcomes that resonate with growth-minded business leaders. We must ensure the message we're sending to the market reflects this.

These are strategic outcomes that resonate with growth-minded business leaders. We must ensure the message we're sending to the market reflects this.

CASE IN POINT: PLUMBING COMPANY'S TRANSFORMATION

A family-run plumbing company that had been in business for 40 years partnered with Paychex PEO during a

period of rapid expansion. With a 30% increase in headcount and growing complexity across multiple jurisdictions, they needed more than administrative support—they needed strategic HR guidance.

Through their PEO partnership, the company:

- Saved 960 hours annually on HR research.
- Doubled their technician team, increasing service capacity.
- Achieved 30% year-over-year revenue growth.

These results weren't just operational wins—they were strategic milestones. The company's COO described the PEO relationship as "some of the best money we've ever spent," underscoring the business impact of expert HR partnership.

WHAT THIS MEANS FOR US

As PEO professionals, we have an opportunity—and a responsibility—to evolve our messaging. We must speak the language of growth, not just efficiency. This means:

- Training sales and client service teams to articulate strategic outcomes.
- Updating marketing materials to reflect business impact, not just service features.
- Encouraging clients to view their PEO relationship as a lever for expansion, not just a safety net.

The PEO industry is at a pivotal moment. Our services have always supported growth—but now, our narrative must reflect it. By repositioning ourselves as strategic partners, we can deepen client relationships, expand our influence, and elevate the role of PEOs in the future of work. ■



CHAD PARODI

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PEO PULSE: KEY METRICS ON THE RISE

The results of NAPEO’s PEO Pulse Survey for the second quarter of 2025 show the PEO industry with strong momentum. Compared to the same period in 2024, survey results show widespread increases in revenue, profitability, client count, and worksite employees (WSEs), alongside continued wage pressures and steady-to-improving workers’ compensation claims. Importantly, optimism for the year ahead remains high.

KEY FINDINGS

Revenue and Profitability Gains

Three out of four firms (75%) experienced revenue growth versus Q2 2024, with the majority describing it as “somewhat higher” (68%). Only 3.6% reported declines. Profitability gains were even more widespread. Nearly 79% of PEOs increased gross profit, with only 7% reporting declines.

Clients and Worksite Employees
More than 7 in 10 PEOs (72%) reported an increase in clients, up sharply from Q1 2025, when fewer than half reported gains. Only 11% of firms reported declines in client count, highlighting a largely stable client base across the industry. At the same time, client employee counts are also trending upward. About one-third of PEOs (32%) reported higher average WSEs per client, while most others (57%) said this measure held steady. Only 11% reported decreases. The results indicate that employment at client companies was steady overall, with increases outpacing decreases.

Outlook: Continued Positive Momentum
Expectations for the next 12 months remain very strong. Nearly all PEOs (93%) anticipate growth in worksite employee counts, with 18% forecasting significant increases. Only 7% expect stability, and no respondents project declines. ■

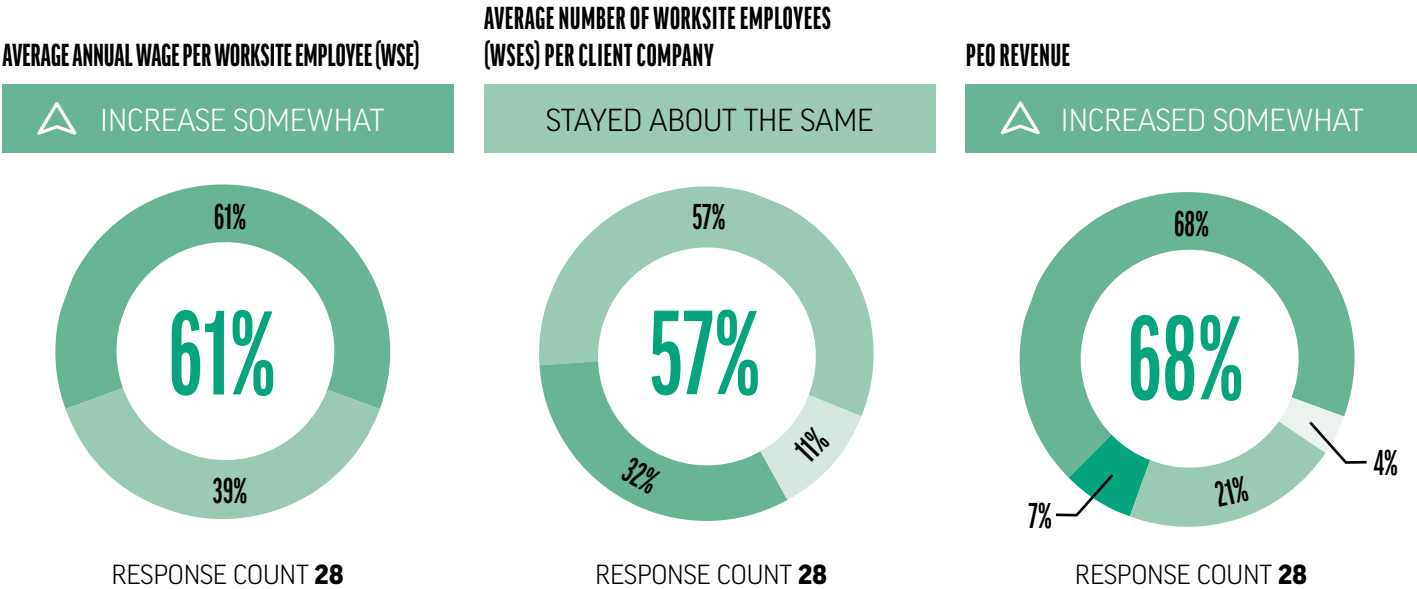
NAPEO QUARTERLY PULSE SURVEY—Q4 2024 RESULTS



▼
* The Expected Growth Index is based on the average score on a five-point scale:
1 = Significant Decrease / 3 = No Change / 5 = Significant Increase.

NAPEO’s Pulse Survey was developed by the Accounting Practices Committee in 2016 and is conducted quarterly among members to take the pulse of the PEO industry through a series of easy-to-answer questions. For more information about NAPEO’s Pulse Survey, please contact Farrah Fielder, ffielder@napeo.org.

HOW DID THE 2ND QUARTER OF 2025 COMPARE WITH THE 2ND QUARTER OF 2024?



- Increased Significantly
- Increased Somewhat
- Stayed About the Same
- Decreased Somewhat
- Decreased Significantly

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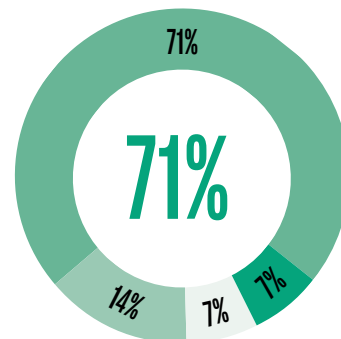
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GROSS PROFIT (\$)

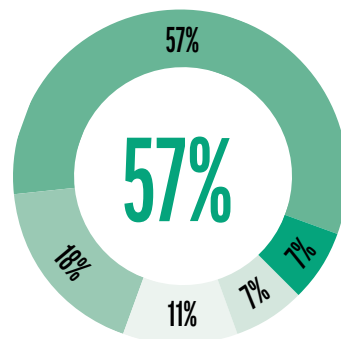
▲ INCREASE SOMEWHAT



RESPONSE COUNT **28**

OPERATING INCOME (\$)

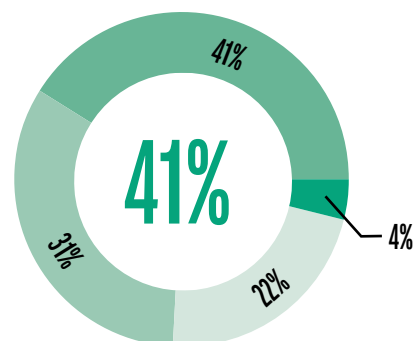
▲ INCREASE SOMEWHAT



RESPONSE COUNT **28**

NUMBER OF INTERNAL EMPLOYEES (INCLUDING SALESPeOPLE)

STAYED ABOUT THE SAME



RESPONSE COUNT **27**

AD INDEX

Aetna.....	44	isolved.....	41	PRO Software, LLC.....	29
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Boldface type indicates NAPEO Medallion Partner

▼ PEO Insider's annual Form 3526 Statement of Ownership, Management, and Circulation is reprinted below to comply with US Postal Service regulations.

Statement of Ownership, Management, and Circulation
(All Periodicals Publications Except Requester Publications)

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7. Known Bondholders, Mortgagees, and Other Security Holders Owning or Holding 1 Percent or More of Total Amount of Bonds, Mortgages, or Other Securities. If none, check box ☒ None
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8. Tax Status (For completion by nonprofit organizations authorized to mail at nonprofit rates) (Check one)
☒ Has Not Changed During Preceding 12 Months
☐ Has Changed During Preceding 12 Months (Publisher must submit explanation of change with this statement)

9. Publication Title
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10. Issue Date for Circulation Data Below
09/01/2025

11. Extent and Nature of Circulation

	Average No. Copies Each Issue During Preceding 12 Months	No. Copies of Single Issue Published Nearest to Filing Date
a. Total Number of Copies (Net press run)	5,349	5,495
b. Paid Circulation (By Mail and Outside the Mail)		
(1) Mailed Outside-County Paid Subscriptions Stated on PS Form 3541 (Include paid distribution above nominal rate, advertiser's proof copies, and exchange copies)	0	0
(2) Mailed In-County Paid Subscriptions Stated on PS Form 3541 (Include paid distribution above nominal rate, advertiser's proof copies, and exchange copies)	0	0
(3) Paid Distribution Outside the Mail (including Sales Through Dealers and Carriers, Street Vendors, Counter Sales, and Other Paid Distribution Outside USPS)	0	0
(4) Paid Distribution by Other Classes of Mail Through the USPS (e.g., First-Class Mail®)	10	17
c. Total Paid Distribution (Sum of 10b(1), (2), (3), and (4))	10	17
d. Free or Nominal Rate Distribution (By Mail and Outside the Mail)		
(1) Free or Nominal Rate Outside-County Copies Included on PS Form 3541	0	0
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(3) Free or Nominal Rate Copies Mailed at Other Classes Through the USPS (e.g., First-Class Mail®)	0	0
(4) Free or Nominal Rate Distribution Outside the Mail (Carriers or other means)	70	70
e. Total Free or Nominal Rate Distribution (Sum of 10d(1), (2), (3), and (4))	70	70
f. Total Distribution (Sum of 10c and 10e)	80	87
g. Copies not Distributed (See Instructions to Publishers #4 page K3)	5369	5408
h. Total (Sum of 10f and 10g)	5449	5495
i. Percent Paid (10c divided by 10f times 100)	8.67%	8.7%

* If you are claiming electronic copies, go to line 16 on page 3. If you are not claiming electronic copies, skip to line 17 on page 3.

12. Electronic Copy Circulation

	Average No. Copies Each Issue During Preceding 12 Months	No. Copies of Single Issue Published Nearest to Filing Date
a. Paid Electronic Copies	0	0
b. Total Paid Print Copies (Line 10c) + Paid Electronic Copies (Line 12a)	80	87
c. Total Paid Distribution (Line 10c) + Paid Electronic Copies (Line 12a)	80	87
d. Percent Paid (Both Paid Print & Electronic Copies) (10c divided by 10f times 100)	8.67%	8.7%

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14. Signature and Title of Editor, Publisher, Business Manager, or Owner
CHRIS CHANEY
Editor, PEO Insider
Date: **9-2-25**

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SERVANT LEADERSHIP

BY CASEY M. CLARK

A few weeks ago, I sent a note to our board noting the remarkable strides our country has taken since the tragedies of 9/11/01, while also lamenting the unthinkable political violence we experienced with the assassinations of Charlie Kirk and Melissa Hortman.

It was, and still is, a dichotomy: a business trip to Manhattan on September 11 was now normal; murder due to political differences should never be. It's hard for all of us to comprehend these things, let alone explain them to our young children.

In the note, I paraphrased Mr. Roger's great counsel to Find the Helpers in challenging times, remarking that in my extensive time with our elected leaders, I still see an overwhelming commitment to making our communities and our country better. In these divisive political times, we need civil servants who forego privacy and, increasingly, security to serve, even those whose opinion of what the greater good is or how we achieve it differs from our own.

Our industry has this in spades. We're blessed with innumerable leaders committed to rising the tide for PEOs, not

just their own boat. NAPEO's leadership is chock full of individuals who show up and contribute, repeatedly telling me they are there because they want to give back to an industry that's given them so much. It's a unique quality that permeates our industry, and my friend and NAPEO's departing Board chair David Feinberg really exemplifies this.



While he won't want the recognition for it, this progress has David's fingerprints all over it.

Anyone who has ever been in a meeting with David knows that, without fail, he's always got a question that will challenge thinking or approach, and we always learn something from him not just being present but being prepared for the meeting and interested in making us better.

Before I knew this was habit, I experienced it in my, let's call it "thorough" interview process, where David served as a member of the search committee. I left all of those meetings impressed by the depth of the conversations, and even more excited about what it must feel like to work in this industry.

David ran our board nominations process last year while on sabbatical, frequently fielded (tolerated?) texts and calls in evenings and on weekends, and somehow came to anticipate an unscheduled, but nonetheless regular Friday afternoon call. Together we made real progress to modernize NAPEO to meet the industry where it's going, tackling difficult and delicate member, policy and association issues that have and will continue to make us better. While he won't want the recognition for it, this progress has David's fingerprints all over it.

When you read this, David will have already passed the Chair torch to Bill Maness, one of those leaders committed to giving back I mentioned earlier. Bill inherits a better organization than where we were when David took on this role, and will no doubt leave it better still.

The commitment they've both made to add the responsibilities of industry leadership to their personally and professionally full plates is not just admirable, it's an example of dedication, balance and sacrifice we all benefit and can learn from. ■



CASEY M. CLARK

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