

Proposal for Services



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PAYCHEX

Payroll | Benefits | HR | Insurance

Executive Summary

On behalf of Paychex, I'd like to thank you for the opportunity to discuss your organizational needs and review how we may effectively partner to help you reach your business objectives.

To support your evaluation process, I've prepared this proposal for your review. In the following sections, we'll cover:

Implementation and Service

Provides information on the implementation process, including timing, personnel, and the transition to ongoing service.

Your Custom Paychex Solution

Reviews the Paychex HR technology and service solutions we recommend to help address your current challenges.

Investment Summary

Outlines all costs and financial investment associated with your custom Paychex solution.

Over our 45+ year history, we've helped thousands of customers like you realize measurable results and better business outcomes by simplifying complexities related to:

People

Shaping a workforce that's:

- Engaged
- Driven, and
- Aligned with leadership expectations and vision

Money

Managing critical financial processes like:

- Running payroll
- Remitting payments, and
- Managing expenses

Productivity

Moving the organization forward by:

- Uncovering efficiencies
- Reducing risk, and
- Improving data integrity

I'm confident Paychex can deliver the capabilities you need to help resolve your challenges and realize meaningful results for your organization. Please review the following information and feel free to contact me with any questions or feedback you may have. I appreciate your consideration and I look forward to discussing next steps.

Implementation and Service

At Paychex, we understand that starting a new partnership or switching providers is a critical time for your business. But we're with you every step of the way.

From day one, you'll always have a dedicated point-of-contact to answer your questions, proactively keep you informed on progress, and deliver knowledgeable, friendly support throughout your relationship with Paychex.

Who you will work with:

Paychex Sales

I'll confirm all necessary agreements and documentation are submitted so we can get started on your account set up. I'll also work with you throughout your first year with Paychex to identify any other business needs you may have and recommend applicable solutions.

Implementation Coordinator

I'm your go-to representative throughout implementation, acting as the "quarterback" on your behalf, coordinating with implementation and training personnel to ensure you're comfortable working in the solution and that it meets your specifications.

Account Manager

Following implementation, your implementation coordinator will transition management of your account to me. I'll be your primary point-of-contact at Paychex from here on. You'll have my direct contact information for any questions that may come up.

Client Success Representative

After 12 months with Paychex, I'll take over the sales relationship for your account. I'll work closely with your account manager to confirm we're continuing to provide you with the right mix solutions and keep you up to date on the latest technology and service enhancements from Paychex.



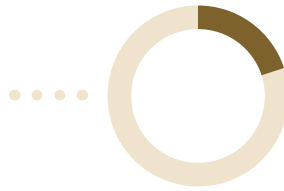
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Here's an overview of what you can expect during implementation:

1. We're in Business

Thanks for choosing Paychex! Your sales representative will provide you with a New Client Checklist outlining all the necessary information we need to start setting up your account.



2. You're Invited

Within 24 hours of receiving your documentation, your dedicated implementation coordinator will send you an invitation to join a Welcome Call.

3. Meet and Greet

During your Welcome Call, your implementation coordinator will introduce you to supporting members of the implementation team and outline expectations, including timing and next steps.



4. Let's Get to Work

We'll get your account up and running by setting up policies, granting access, coordinating training, and walking you through your first payroll with Paychex.

5. The End is Just the Beginning

Congratulations! The implementation process is complete, but we're just getting started. Your implementation coordinator will introduce you to your dedicated account manager who will be your primary point-of-contact at Paychex for ongoing support.



Please refer to the attached timeline for a more detailed view of the implementation process based on the recommended products and services represented in this proposal.

Your Custom Paychex Solution

People

We'll help you shape a workforce that's engaged, driven, and aligned with leadership expectations and vision.

Employee Onboarding Help your people complete important, new-hire tasks quickly and efficiently via a completely digital, mobile-friendly experience.

Tax Credit Services Reduce your tax liabilities by hiring individuals from groups such as food stamp recipients, temporary assistance for needy family recipients, and unemployed veterans. We can help identify employees that make you eligible for the Work Opportunity Tax Credit, which can reduce your federal tax liability from \$1,200-\$9,600 per eligible employee.

Employee Handbook Builder Minimize the risk of employee liability by communicating compliant regulatory policies, while instilling your company values, culture, and expectations within a legally-reviewed employee handbook.

HR Administration Reduce turnover and develop your top performers by creating a culture of continuous feedback that empowers professional growth. Provide them with the feedback they need to excel at your organization. Capture, store, and access employee documentation and personnel records in the cloud with unlimited storage and accessible 24/7.

Learning Management Position your employees to drive better results and reach their career goals by closing skill gaps. Leverage learning management to train your team, including new hires and tenured veterans with customizable learning plans.

Money

We'll provide solutions that can help you manage critical financial processes like running payroll, remitting payments, and managing expenses.

Taxpay(R) Federal, state, and local payroll taxes will be automatically calculated and deposited as well as accompanying tax returns filed on your behalf.

Payroll Services Ability to pay employee's and independent contractors via check, direct deposit, or paycard, and remit payments to third-parties for garnishments or to vendors, automatically.

Job Costing and Labor Distribution

Determine how resources and time are spent with greater precision. Create labor assignments or project descriptions to your specifications to organize expenses to assist in determining what parts of the business are profitable, and integrate data with your general ledger.

Financial Wellness

Help employees take control of their finances with helpful financial planning resources, including an online personal wellness assessment, calculators, apps, and other educational tools.

Productivity

We'll help you keep the organization moving forward with solutions that can uncover efficiencies, reduce risk, and improve data integrity.

Employee Self-Service and Mobile App

Deliver an employee experience that helps your people complete important HR tasks on their own and in compliance with regulations and company policies. We offer 25 employee self-service actions, enabling client and employee independence, including the ability to update address info, enter life events, fill out tax forms, report hours, and manage retirement accounts.

Data Exports

Export many types of reports into spreadsheets that you can customize or import into third-party software.

General Ledger Service

Synchronize your general ledger data with popular accounting software in real-time, including QuickBooks, Sage Intacct, and Xero.

Online HR Library

Save time researching answers to your most urgent HR questions. We offer access to 500 downloadable HR forms and letters, 800 job description templates, state and federal employment law information, and salary benchmarking tools.

Reporting and Analytics

Gain insight into your business with 160 + reports, create your own custom reports, and access benchmarking tools that leverage industry data of our 600,000+ customers.

Investment Summary

Blue Oak Charter School
 Created Date: 9/25/2019
 Quote Number: Q-283842

Flex Enterprise Package Includes:

Payroll Processing | Employee Handbook Builder | Flex HR | Flex Onboarding Essentials | Taxpay | Direct Deposit | Check Signing or Readycheck | Skylight Paycards | Check Insertion | Check Logo | Employee Access Online | New Hire Reporting | 401(k) Report/File | General Ledger Report | Online Reports | Reports On-Demand | Paychex Employee Screening Essentials - 30 | Paychex Flex Mobile App | On-site Checks | HR Library | Labor Posters | 24/7 Live Support | Dedicated Service Rep | Garnishment Payment Service | SUI Service | Data Exports | General Ledger Reporting Service | Workers Comp Report/Payment Service | Time off Accrual | Labor Distribution/Job Costing | FinFit

Per Pay Period Fees

Per Pay Period Fees	Payroll Frequency	Units	Rate
Paychex Payroll	Semi-monthly	26	\$161.16
FLEX Onboarding Essentials	Semi-monthly	26	\$0.00
Payroll Delivery	Semi-monthly	1	\$11.50
Paychex Payroll	Monthly	36	\$273.77
FLEX Onboarding Essentials	Monthly	36	\$0.00
Payroll Delivery	Monthly	1	\$11.50

Monthly Fees

Monthly Fees	Units	Rate
Employee Handbook	26	\$0.00
Employee Handbook	36	\$0.00
TOTAL:		\$0.00

Annual Fees

Annual Fees	Units	Rate
YE Processing- Forms W2/1099 - Per User	26	\$175.50
YE Processing- Forms W2/1099 - Base	1	\$75.00

Annual Fees	Units	Rate
W2 Delivery	1	\$20.00
Quarter/Year End Report Delivery	4	\$48.00
YE Processing- Forms W2/1099 - Per User	36	\$243.00
TOTAL:		\$561.50

One-Time Fees

One-Time Fees	Net Total	
HIREtech Remote I-9	\$0.00	
Flex Implementation Fees	\$350.00	
TOTAL:		\$350.00

Per Employee Per Month: \$10.93 *

*Products are billed per the frequencies outlined above, and clients will be invoiced accordingly based on actual usage each frequency.

Annual Total: \$8,128.61

Preferred Partner Solution of  an AICPA Company

As a client of Christy White Accounting you will receive our AICPA-Paychex Partner Program Discount of 1 Month Free on HR Services ASO Package credited in your sixth month on the service up to \$2500. Terms and conditions apply. (<http://www.paychex.com/accounting-professionals/partners/aicpa-terms.aspx>).

Please initial to indicate your understanding and agreement with this proposal: _____

* Additional training content for Paychex Learning Product offering is purchased through the e-commerce tool site by authorized users.