

## Your Goals & Preferences

What are your top priorities in partnering with a PEO? (Select up to 3)

- Save time on admin tasks
- Ensure compliance and reduce liability
- Streamline payroll and HR
- Support multi-state growth
- Reduce workers' comp costs
- Lower health insurance costs
- Other

What systems do you currently use for accounting, time, or recruiting?

What's most important when choosing a PEO?

- Cost
- Service/support
- Expertise in my industry
- All of the above

Do you require bilingual support (e.g., Spanish)?

Do you need integrations with your current software?

Do your employees need a mobile app or online portal?

How soon are you looking to implement a new PEO.

Please return this information, along with the RFP or Acord 130 form to:

[submissions@peomarketplace.com](mailto:submissions@peomarketplace.com)

Call if you have questions: 352-562-6551

## Payroll Needs

How is payroll currently handled?

- In-house
- Accountant or bookkeeper
- PEO
- Payroll service
- Other

How often do you run payroll?

- Weekly
- Bi-weekly
- Semi-monthly
- Monthly

Do you pay employees using:

- Hourly wages
- Salaries
- Commissions
- Bonuses
- Prevailing wage/job costing
- Other

Do you issue paper checks direct deposit, or both?

Do you need pay cards or cash options for unbanked employees?

- Yes
- No

Select what you need assistance with:

- Job costing or certified payroll
- Direct deposit setup
- Payroll tax filings and compliance
- Time clock or mobile punch-in solutions

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# Human Resources (HR) Support

Do you have an HR person or team?

Yes – In-house

No – We handle it ourselves or use outside help

What HR tasks are most challenging for your team? (Check all that apply)

Hiring & onboarding

Employee paperwork

Disciplinary actions or terminations

Writing policies or an employee handbook

HR compliance (laws, posting requirements, etc.)

Managing PTO/sick time

Do you need help with job descriptions or performance reviews? Do you conduct background checks or drug screenings? Are you experiencing turnover or retention challenges?

other

Would it be helpful to have on-demand HR support or an advisor?

Yes

No

Maybe — depends on cost

How are you currently tracking time off (PTO, vacation, sick leave)?

Paper or spreadsheets

Software or app

We don't track formally

Are you concerned about staying compliant with changing employment laws?

Yes

No

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## Employee Benefits

Do you currently offer employee benefits (health insurance, etc.)?

Yes  
No

Do benefit options or costs vary by state for your team?

Yes  
No  
We only operate in one state

If yes, what benefits do you offer? (Check all that apply)

Medical insurance  
Dental & vision  
Life or disability insurance  
401(k) or other retirement plan  
HSA or FSA  
Other

What's your average monthly cost (per employee) for benefits?

\$0-\$250  
\$250-\$500  
\$500-\$750  
\$750+  
Not sure

Are you looking to:

Improve benefits  
Lower costs  
Both  
Not sure

Do you need help managing:

Open enrollment  
Benefits paperwork  
Carrier communication and claims issues  
ACA compliance or reporting

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