



The Paychex Partnership Program - Banks and Credit Unions

A successful relationship is the one
you don't have to think about – because it's built on trust

PAYCHEX

You Gain a Partner Committed to Your Values and Success.

Whether helping our partners or their clients, Paychex places a premium on offering and continually innovating resources that can help elevate the level of understanding on new trends, business practices, and ultimately performance.



Business Education

- **Paychex Knowledge Center:** This online library, contains articles on key topics written by compliance and business experts.
- **Learning Management System (LMS):** Build loyalty among your employees and build a more stable business by providing this educational tool, available through Paychex Flex, that promotes skill, career, and leadership development.
- **Webinars:** Helping educate your clients on compliance obligations and keeping them informed of business trends can elevate your advisory role. We can be a resource for you and your clients.

This partnership has a simple mission - to use every resource available to do what's best for our clients.

Program Management

Our program features:

- Single point of contact to help answer questions and provide ongoing service.
- Regular partnership reviews will monitor progress toward meeting goals such as sales activity and relationship initiatives.
- Marketing collaboration and support.

Leadership

- With our CEO and corporate officers regularly sought by the media to provide insight and perspective on business, employment, and compliance trends, we'll share that expertise with you.
- Our dedication to providing ongoing education and information on legislation that impacts compliance and regulations - before, during, and beyond the COVID-19 pandemic - is underscored by our presence in Washington, D.C.



Market-leading payroll, HR, tax, and compliance solutions

Program Benefits for Banks and Credit Unions

- A valued business product expansion that keeps you competitive.
- Revenue opportunities that can develop from conducting a needs analysis with clients and providing referrals back to you.
- Savings – in time and money – result from using payroll solutions that are flexible for the your clients, mitigate complications during a changeover, and create stability that enhance retention.
- Valuable fee income earned simply by referring clients.

Program Benefits for Banks and Credit Unions

- A simple-to-implement referral program; identify your prospects and a local Paychex representative closes the sale.
- New business referrals that come back to you from Paychex.
- Relationships that grow your business – working with CPAs, a broader customer base through referrals, and Paychex.

Customer Service

Paychex provides on-demand, dedicated service – 24/7/365, in English and Spanish – to hundreds of thousands of organizations throughout the U.S. and northern Europe. Our local sales representatives are business-community experts in their markets.

We Give Your Customers Time to Focus

On Their Business

- Taxpay® provides federal, state, and most local payroll tax computation and filing.
- Employee pay options include direct deposit, Readychex®, check signing, and pycards.
- Create custom reports with Paychex Report Writer.
- 24/7 support from a dedicated payroll specialist and after-hours assistance from our service center.
- With payroll, your clients also gain access to potential tax credits.

On Maintaining Compliance

- Updated labor law poster kits are available in printed or electronic versions.
- New-hire reporting meets requirements for new and rehired employees.
- Online HR library provides access to personnel forms and employment information.
- Your clients receive help needed to navigate ever-changing employment laws and regulations to help them understand compliance obligations.

Your Clients Can Run Their Business from Anywhere

With Paychex Flex, your clients gain 24/7 access to information - even via mobile devices - to get business done from anywhere.

- Employers can start, edit, and submit payroll while offsite
- Employees can access W-2s and check stubs, retirement balances, PTO balances, and more.

Leadership and Service

Paychex, Inc. (Nasdaq:PAYX) is a leading provider of integrated human capital management solutions for human resources, payroll, benefits, and insurance services. By combining innovative software-as-a-service technology and mobility platform with dedicated, personal service, Paychex empowers business owners to focus on the growth and management of their business. Backed by 50 years of industry expertise, Paychex serves more than 730,000 payroll clients as of May 31, 2022 in the U.S. and Europe, and pays one out of every 12 American private sector employees.

Contact us today at (855) 973-2385

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PAYCHEX

Paychex has been named:

Nacha Certified

Demonstrates effective ACH Rules compliance and risk management, and sound corporate governance



One Of the World's Most Ethical Companies



-Ethisphere Institute

Innovation in Customer Service – Financial Services Industry



- Stevie Awards

BIG Innovation Award for Paychex Pre-Check technology solution.



- Brandon Hall Group

One of the World's Most Ethical Companies® for the 14th time. Best HR Outsourcing Solution for Small Businesses



- Ethisphere Institute

Leader in corporate reputation among Financial Data Services Companies



- Fortune® Magazine