

**FROM OUR
PEOPLE TO
OUR CULTURE
WE'RE
DIFFERENT.**

Our Story

**HUMAN
RESOURCES.
TIME & LABOR
MANAGEMENT.
PAYROLL.
IT'S WHAT WE DO.**

While working at a large payroll company for 10 years, the Balance Point founders saw a strictly profit-driven business model interfering with the ability to put the client first. To put it frankly, it was a buttoned-up environment hindering creativity and employee satisfaction.

They envisioned something different. They saw an opportunity to build a company designed to answer to the client—not to Wall Street. Equipped with this vision, the founders used their industry expertise to build the kind of company where they wanted to work—a flexible, high energy company filled with payroll enthusiasts. And it caught on.

Our Culture

Balance Point started with no clients, four owners, and the mission to help companies seamlessly handle all aspects of HR, from hire to separation. We knew going in that the nuts and bolts of payroll are the same no matter where you go. We're not different in technology or in the way that we calculate payroll taxes—that's the same everywhere. The difference is in our people and our culture: a difference that impacts the way our clients feel when they work with us. We work hard to find the best, most experienced people in the industry one by one, as well as to create an intimate atmosphere where employees are challenged and feel accountable.

WE ANSWER TO CLIENTS— NOT SHAREHOLDERS.

We had the same strategy when we brought in our first employee as we did when we brought in our 50th—we train all new employees in-house, giving them exposure to every solution and area of payroll. We did and continue to do this so that we can provide a single point of contact to the client. Our people are trained to deliver a wide range of solutions, making it unnecessary for them to pass over the phone to another person. Our new employees shadow

and sit with multiple employees to learn how we work with clients. We don't believe that hours of web training could fully prepare our client service reps to please clients. Our employees learn about the types of work each client does and take great interest in the business. They learn about the client's business partners, like their CPA, Health Insurance Broker, TPA and all other trusted advisors.

THE GUYS THAT STARTED IT ALL.



Jess Cary



John Egan



Peter Luciano



David Magen

Through this training process, our new employees get to know each other on a professional basis. They learn about the work that we do and the way that we interact with clients. And through spontaneous office cake-eating contests, happy hours, bowling outings, and Tough Mudders, they learn our mentality and company culture, and start to get a feel for what we're all about.

Things have changed at Balance Point as we've grown, but much has stayed the same. We work from the same office, buy from the same vending machine, and have the same mission, dedication, and enthusiasm we started with in 2003. But these days the kitchen is more crowded at lunch and we have gained a wealth of business experience. We thrive off customer satisfaction and believe that maintaining the open-minded, up-for-anything attitude we started with is the best way to make our clients happy.

WE THRIVE ON CUSTOMER SATISFACTION—MAKING YOU HAPPY MAKES US HAPPY.

To us, keeping our clients happy means giving them a seamless experience with anywhere, anytime access to payroll, time & labor, and HR through a cloud-based solution. It means protecting data at every level with state-of-the-art security measures, and keeping clients in compliance with the best Certified Payroll Professionals in the industry. It also means integrating clients' data with their providers and in-house software, and giving them the ability to securely deliver paperless payroll to each

employee's inbox. Most importantly, it means freeing up time for managers to concentrate on their employees, clients, and business strategy.

We see ourselves continuing to deliver on these commitments in the future, while growing and expanding deeper into the services we provide. Our plan is to grow properly and responsibly as we have since our inception, finding new and creative ways to support our clients.

**WE STARTED
WITH NO CLIENTS,
4 OWNERS
& A MISSION**

**TODAY,
WE HAVE
50+
EMPLOYEES**

Our People

WE'LL BE THERE FOR YOU.

Balance Point people come here because we've built a great company and embrace all the things that make our folks unique. They come here because we believe clients come first, and will do whatever it takes to make them happy. Our people are the engine driving everything we do. We like to think of them as an all-star team; they're good at what they do, enjoy themselves doing it, and are down to earth about it.

Our team is empowered to do the right thing for the client in all situations. The result is a Sales Representative that pushed back the opportunity to work with a client by several months to ensure the client is starting during the best possible time. It is a team of specialists that created a custom interface for a client to make its tip-tracking simple and integrated with payroll. It's a specialist that helped a new client sort out a payroll mess from the quarters the client was with its previous payroll provider. Our Client Service Reps know about their clients' companies, industries, and



The Balance Point team got down and dirty for 2012's Tough Mudder obstacle course.

situations as well as when their clients are going on vacation and how many kids they have. They build long-term relationships.

We know you're not passionate about payroll—but we are. This isn't our first rodeo. Our airplane-flying, basketball-playing, reality-TV watching, family-oriented people are payroll experts. That's what we know, so that's what we do. We believe that outgoing people with years of industry experience who know how to work hard and have fun are

exactly what our clients need to be comfortable with their HR and payroll services. We don't hire wallflowers, we hire go-getters that aren't afraid to roll up their sleeves and put in 110%.

In today's world of ever-changing tax and labor laws, our clients have peace of mind knowing a hard-working Certified Payroll Professional equipped with the most up-to-date knowledge is on their side.

WE'LL MAKE YOU FEEL LIKE THE ONLY ONE.

We've made a name for ourselves by making each client feel like the only client, providing an easy-to-use payroll system, creating customized reports and employee trainings.

Our Client Service Representatives are responsive, bright, and personable people. With Balance Point, each client works with the same person for everything, regardless of the question. This person is familiar with the account, readily available, and takes the time to explain details. In addition to answering questions and supporting existing solutions, our employees recommend solutions to improve processes.

For example, a client service rep saved her client time and reduced errors by recommending they use hand readers at a few large job sites rather than have managers collect timesheets manually. The hand readers connect with

payroll, so that when the right people sign off on hours for the week, the data pushes directly into payroll. Our employees strive to make the client's processes simpler and more automated whenever possible.

In addition to above-and-beyond customer service, Balance Point's clients rave about its user-friendly, easy to navigate payroll system. We're all about saving our clients time, energy, and frustration typically associated with running payroll. Our goal is to provide clients with what they want, not what *we think* they want, and have accomplished this objective from day one. Having a single point of contact who listens to a client request and delivers an effective result, makes and keeps our client happy.

We strive to be the payroll company you would build for yourself.

WE'LL MAKE YOUR LIFE MORE ENJOYABLE.

...by giving you more free time to do what you want. We strive to use products that are so quick, simple, and intuitive that our clients can't think of anything they would change about them. Our products are modern, accessible almost anywhere, and easy to use. We work every day to make our payroll services as automated as we can.



At Balance Point, we focus our energy on core solutions: [Payroll](#), [Time & Labor Management](#) and [Human Resources](#). Our hope is to bring our clients the best possible experience for each of our services and maintain an unmatched relationship unlike any in our industry.



WE'RE DIFFERENT

Go see for yourself: [balancepointpayroll.com](https://www.balancepointpayroll.com)

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