



BALANCE POINT

The Next Level of Payroll Solutions



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BALANCE POINT

Why Balance Point?

Experience unmatched service at Balance Point. You will have your own dedicated Service Representative assigned to work with you on your individual payroll needs. Regardless of what product or service, you have you will work with one person who is familiar with your unique business needs. Unlike other payroll companies, we do not base our service on a call center mentality, but a one-on-one approach.

By honing our focus on payroll and human resource services we are able to provide you with an intimate, client-centric level of service representatives day in and day out.

We focus on working with small to medium sized businesses and strive to be an extension of our clients' companies. Balance Point thrives and differentiates itself by developing customized payroll and HR solutions based on our clients' individual specifications. Our goal is to help companies overcome the challenges faced in an ever changing business climate. ***The time has come to partner with Balance Point!***

Why Balance Point?

Cutting Edge Technology: Web enabled, Thin Client Technology provides a direct, highly secure connection straight to your payroll and Human Resource historical data.

Training: Our goal is to empower our clients and we achieve this goal by providing our clients the tools and understanding they need to see the highest level of results. We recognize the power of knowledge and deliver an intimate training program which maximizes efficiency.

Payroll / HR Simplified – Simplify your current operations through our comprehensive payroll and employee benefit packages.

Payroll & HR Services

Customized Reporting
Tax Service and Deposit Confirmation
Direct Deposit
G/L Interfacing
Time Off Accruals
Employee Self Service

Custom 401k File Creation
Fiscal Reporting
Time and Labor Management
Online Training
HRIS
HR Consulting

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BALANCE POINT

Balance Point System Features

Balance Point's service is centered around a highly secure web enabled Payroll / HRIS software platform used by tens of thousands of companies across the United States.

System Highlights

- Customized Pay Entry Grid: Easily add and remove pay entry columns as desired.
- Ease of Reporting: Instantly view payroll reports prior to processing.
- Quick Payroll Function: One click and you are ready for payroll entry.
- Instant Payroll Reports: These reports are sent to you immediately after processing and you can opt to have pay statements e-mailed to those who have direct deposit as well.
- Web-enabled Payroll Platform with Secure 128K Encryption: This allows multiple users to access the same database simultaneously from any location. No installation of software at your site. No sending or receiving files.
- Our unique "ad hoc" report writer allows users to easily custom build a report from the ground up.
- Your historical payroll data is never purged from our system so you may access it and run reports back to your very first payroll.
- Extensive report library of standard and custom reports may be driven for any date range including fiscally, with flexible parameters; all reports can be saved as Adobe files, some to Excel.
- Interface with virtually all time and attendance systems. Be sure to ask about our web-based time and attendance offerings!
- Globally update benefit elections, deductions and employee rate changes with one command, rather than employee by employee.
- Time off accrual tracking with optional balances on checks and time off reporting instead of expansive reporting caps.
- Human Resource (HRIS) module with Applicant Tracking.
- Create and print manual checks on-site for immediate distribution.
- History tracking ensures an audit trail for every field in the program. View previous values, when they were changed and by whom.
- Pre-created file import / exports for dozens of 401(k) administrators and accounting packages.
- Employee Self Service, which includes Manager Self Service approvals of employee changes and PTO requests.

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BALANCE POINT

Time and Labor Management

Do More With Less!

HOW TO DO MORE WITH A WEB HOSTED EMPLOYEE TIME AND LABOR TRACKING

Do more with less time and less money. Balance Point Web Time lets even the smallest of companies enjoy sophisticated and secure online labor management at a fraction of the cost of purchasing, installing and maintaining a traditional self-hosted system.

As compared to a traditional licensed software package, our Web Time and Web Time Pro web-hosted time and labor management system provides the following advantages:

- No need to buy and install servers and software
- No need to maintain and upgrade software and servers over time
- Data is protected by industry standard security
- Lower cost of ownership over time
- Less configuration, complexity and maintenance costs

Balance Point enables its cost conscious clients to implement technology without paying large up front license fees.

How will this benefit your business?

- Spend Less Time Approving Time Sheets: Save time by automating this paper intensive process, freeing you up for other things.
- Get What You Need Now: The information to manage overtime is readily available.
- Empower Your Decision Makers: Easily expand or scale back functionality to address the unique needs of your administrators, managers and employees.
- Manage Employee Time Off: Benefit accruals are complicated to maintain and difficult to track. The Time Off request tool automates and streamlines this process.
- Various Data Capturing Alternatives: Tracking time against business units, departments, projects, tasks and clients can be challenging. A variety of devices or a combination can be suited to meet your individual needs and budget.

Balance Point's Time & Labor Management platform mean less maintenance and lower operational costs. It's a shift from a capital expenditure to a manageable monthly expense.

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BALANCE POINT

Human Resources Information System (HRIS)

The Balance Point HRIS is a powerful resource for streamlining your HR data and increasing the performance of your Human Resources Department. See how we can make your business more efficient today.

HRIS Highlights

- Data Integration is a key element to building and maintaining a reliable HRIS. Evolution payroll and Evolution HR share one common database eliminating duplicate entry or imports.
- HR Report Library: The HRIS module comes with an additional 20+ HR reports such as EEO, OSHA, Benefit Eligibility, Employee Reviews, Salary History and more.
- Benefit / Eligibility Administration is a powerful feature that allows you to mine eligibility dates easily for any date range and run benefit cost reports.
- Allows for comprehensive tracking of employee personal information, performance reviews, benefits, skills, injuries and much more.
- Applicant tracking is a bonus. Evolution HR includes the ability to track applicant's skills and interview data. With one click they are hired into the payroll system.
- Cobra Administration allows you to track qualifying and billing information for participants.

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BALANCE POINT

HR Support Center

ONLINE SOLUTION

The HR Support Center is available whenever and from wherever the need arises. Access the online HR Support Center 24 hours a day, 7 days a week.

UPGRADE TO HR ON-DEMAND

Receive UNLIMITED HR consultations over the phone or email/internet from **Certified HR Professionals**. Receive answers to your employee relationship questions, unlimited customization of job descriptions, employee handbooks, job descriptions, forms, letters and more!

Support Center Features

- **Employee Handbook** --- Downloadable and customizable.
- **Policy Library** --- Library of standard business policies.
- **State & Federal Laws** --- Written in easy to understand terms.
- **HR Forms** --- Library of business, state and federal forms.
- **HR Checklists** --- Checklists to help organize business tasks.
- **HR Guides** --- Various guidelines providing helpful references in following particular business procedures.
- **Job Descriptions** --- Catalog to help organize and hire employees.
- **Q & A Database** --- Hundreds of questions answered by Pros.
- **HR Best Practices** --- Monthly articles covering best practices.
- **Monthly Newsletter** --- Alerts and articles to stay current.
- **Glossary of Terms** --- Easy to read definitions for key legal terms.
- **HR News and Updates** --- HR-related news feeds and updates.
- **HRCast** --- Monthly podcasts covering HR best practices.
- **HR Resource Center** --- Resources for ordering posters, training materials and reference literature.
- **Quick Guides** --- Guides on the top areas of employee relations.

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BALANCE POINT

Employee/Manager Self-Service

Employee Self-Service is a web-based portal which allows employees to access their payroll information via the internet.

Employer Benefits

- Streamline the entire PTO process by reducing the number of balance requests coupled with PTO requests being managed online through a Manager Workflow approval process.
- Decentralize inefficiencies: By allowing employees to view and alter their employee information (W-4 only) you can reduce the amount of time being spent on adding and altering basic updates.
- Pay statements and W-2's are available online, reducing the time and cost of distribution.
- Reduces the costs and streamlines the distribution related to printed materials by encouraging employees to access web address links, company specific files or documents and company messages or announcements online on the ESS portal.

Employee Benefits

- Access to their personal demographic information such as name, address, birth date, hire date, federal and state withholding status and salary or rates of pay.
- Access pay statements and W-2's for as far back as your company has been with Balance Point.
- Grant the ability to change their W-4 information with manager approval.
- View PTO balances and request PTO through the web portal with manager approval. This eliminates time spent on researching PTO balances.
- Allow employees access to web address links--you specify files or documents and company messages or announcements.

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BALANCE POINT

Report Library

Our Report Library will empower you to obtain the data you require easily and efficiently. Reports may be run across years and with flexible selection parameters. All reports can be saved as PDF's and some to Excel.

As soon as your payroll is processed, your reports can be re-automatically e-mailed back to each of the desired recipients within the hour. Custom and additional reports are offered at no additional charge in most instances.

Standard Reports

- 401(k) Report
- Check Reconciliation
- Cover Letter
- Labor Distribution
- Payroll Register
- Tax Report for Payroll

Additional Standard Reports

- Active Not Paid Report
- Ad-Hoc Employee Data/Payroll Data
- Birthday Report
- Certified Payroll Report
- COBRA Eligibility Report
- Customizable Labor Distribution
- Direct Deposit Report
- Earnings and Deductions Report
- Employee Cost Reports
- Employee Profiles
- General Ledger Report
- FICA Tip Credit Report
- Job Costing Report
- Period Summary
- Personnel Register
- Labor Distribution
- Time Off Register
- Time Off History Report
- Time Off Taken Report
- Workers Compensation
- Federal Tax Confirmation Report

Standard HRIS Reports

- HR Attendance Report
- HR Active Employee Report
- AR Age Report
- HR Applicant Alert Report
- HR Benefit Alert Report
- HR Benefit Analysis Report
- HR Employee Benefits Report
- HR Benefit Statement
- HR EE Emergency Contact Report
- HR EEO / EEO-1 / EEO
- HR Employee Data Report
- HR Employee Review Report
- HR Employee Review w/Super. Sheet
- HR Mailing Labels
- HR OSHA 300 / 300A / 301 Reports
- HR OSHA Injury Reports
- HR Performance Ratings History
- HR Personnel Report
- HR Salary Rate History Report
- HR Veteran Report
- HR Workers Comp Code Report

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BALANCE POINT

Report Library

Federal Tax Confirmation Report

This report substantiates Federal Tax Payments and displays the actual IRS confirmation numbers of the Federal deposits made on behalf of your client. It can be generated directly from our highly secure web-based payroll system.

#A159Z				
Federal Tax Payment Confirmation (R738)				
Check Date:	01/11/2008-1 TO 03/21/2008-3			
Period Range:	12/24/2007 TO 03/16/2008			
Week Number:	Week #12			
Check Date	Status	Status Date	Tax Payment Confirmation Method	Amount
01/11/2008	P	01/18/08	CONF#27484170086	\$4,518.28
01/11/2008	P	04/24/08	CONF#27485210037	\$134.82
01/25/2008	P	01/30/08	CONF#27484300043	\$7,882.84
01/25/2008	P	04/24/08	CONF#27485210037	\$208.41
02/08/2008	P	02/13/08	CONF#27484440049	\$4,442.60
02/08/2008	P	04/24/08	CONF#27485210037	\$84.47
02/22/2008	P	02/26/08	CONF#27484580093	\$4,432.55
02/22/2008	P	04/24/08	CONF#27485210037	\$27.75
03/07/2008	P	03/11/08	CONF#27484720020	\$4,417.89
03/07/2008	P	04/24/08	CONF#27485210037	\$12.55
03/21/2008	P	03/25/08	CONF#27484860067	\$6,112.78
03/21/2008	P	04/24/08	CONF#27485210037	\$49.79
				\$32,324.73

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BALANCE POINT

Pay As You Go Workers Comp

Reduce Your Paperwork. It's that simple.

Every business owner knows that workers' compensation premium payments can be a headache. Constant changes in staff, extra employees for peak seasons, trying to find replacement workers - all contribute to the fact that you just don't have time to manually update your premium estimates.

We understand the pressures of your business. That's why we've come up with a solution - the Pay As You Go Solution - the perfect way to take the hassle out of workers' compensation premium payments.

Pay As You Go Solutions has been designed to increase your cash flow while helping to minimize large, unexpected payments following a premium audit.

Our seamless integration allows you to know exactly how much you are paying for workers compensation insurance throughout the year.

With Pay As You Go Solutions you pay your workers' compensation premiums based on your actual payroll - one payroll period at a time.

This eliminates the need for large estimated down payments, and helps to minimize the likelihood of a large audit payment due at the end of the policy year. The process is seamlessly integrated with the payroll services you already enjoy.

Pay As You Go Solutions automatically calculates your workers' compensation costs and premium payments - no guesswork!

Why Use Pay As You Go?

- Eliminate large down payments
- Achieve better cash flow management
- Freedom from writing checks
- Freedom from finance and billing fees
- Helps minimize audit adjustments

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BALANCE POINT

General Ledger Interface

Utilizing Balance Point's General Ledger import is the quickest, most accurate and effortless way to get your payroll data into your General Ledger system.

Our General Ledger Interface allows for seamless, electronic files to be imported into your accounting software, removing the manual keying of data.

If we do not interface with your current accounting software we can discuss adding it to our growing list.

If you prefer, you can simply opt for our General Ledger Report which will provide you with your journal entry displaying your GL numbers.

Either way, at Balance Point we understand the complexities of General Ledger and will streamline your current process.

Current Packages

We currently interface with over 33 accounting packages including:

- QuickBooks
- Peachtree
- Mas 90
- Great Plains
- MIP
- AccPac
- JONAS
- Call us today to find out if we are interfaced with your software.

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BALANCE POINT

Check Delivery Options



Balance Point is proud to offer your employees a variety of methods to access and receive their payroll checks.

Benefits of Check Delivery

- Reduce unnecessary paper.
- Streamlines and saves you time and money in your check distribution process, especially for employees in remote locations.
- Encourages and promotes direct deposit within your company, thus reducing lost live checks as well as the time spent on reconciling them.
- Saves the Payroll Administrator / HR Manager time doing lookups for PTO balances, providing lost checks, stop payments, etc.

Option 1

Automatically receive their direct deposit voucher via email in a secure password protected file. Can be used selectively – does NOT require all employees.

Option 2

Automatically receive an e-mail with a link which directs them to the Balance Point Employee Self Service Portal, where they may access their entire check history as well as other information such as PTO Balances, W-2's and more.

Option 3

Directly access the Balance Point Employee Self Service Portal to view their check history while continuing to receive a paper voucher if they so choose.

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BALANCE POINT

Virtual Mail Room

Our Virtual Mail Room allows you to receive all your payroll reports, direct deposit pay statements and quarterly tax returns automatically after your payroll processes, in a password protected e-mail format.

Enable your company to **become truly paperless** while increasing the security level of your confidential payroll information. This cutting edge technology is the future of payroll and why Balance Point is the “Next Level of Payroll Solutions.”

Virtual Mail Room Benefits

- Automatically receive all payroll reports immediately after processing.
- Reports arrive as password protected Adobe files.
- Direct deposit check stubs are emailed directly to employees, password protected.
- Quarterly tax returns are sent electronically.
- Receive 401(K) files ready for upload to your pension administrator or TPA.
- Reports can be sent at the desired frequency and to specific email locations.
- Quarterly, year-end and/or per pay period reports can be emailed directly to your accounting firm at your request.
- Reduces and eliminates unnecessary paper.
- Eliminates unwanted viewing and storage of confidential paper payroll reports.
- Streamlines and saves you money in your check distribution process.

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BALANCE POINT

CPA Benefits

One of our main goals at Balance Point is to create a seamless relationship between you and your clients' payroll data.

Our extensive payroll experience has taught us referrals are earned through establishing credibility and delivering on our promises. It's our intention to become an extension of your firm and provide you and your clients the best customer service in the industry.

Why Work with Balance Point?

- **Proof of Federal Tax Payments** on the Balance Point Federal Tax Confirmation Report each pay period or by accessing the EFTPS site.
- Access and view your clients' payroll records from your office or home computer. Generate reports for any desired date range, including fiscally.
- Balance Point never purges your clients' data, allowing you instant access to historical data not typically available with other vendors.
- Interface with the most popular accounting packages to help streamline G/L posting and check reconciliation; including QuickBooks, Peachtree, Mas 90, Great Plains and many more.
- Virtual Mail Room is the latest offering by Balance Point that can automatically email you and/or your staff accountants your clients' payroll reports, as well as their quarterly and year end tax returns moments after they process.
- Your clients and staff always work with a qualified and experienced payroll professional.
- Balance Point is a SAS 70 Type 2 audited and compliant company.
- Complete audits back to January to guarantee Quarter End and Year End accuracy.

Balance Point's success is predicated on long-term relationships, not market share.

The time has arrived to partner with Balance Point!

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BALANCE POINT

Testimonials

"Due to the complexity of my payroll, I've been down the road of using national vendors to meet my needs—but have been unhappy with their service. I can honestly say that Balance Point has been able to meet all my payroll needs. It is refreshing to find a payroll company that not only delivers on what they promise, but that goes the extra mile to make it easy to process payroll. The software is user-friendly and the staff is prompt, courteous and knowledgeable. I would recommend Balance Point to any payroll professional."

- Karen, Upper Saddle River, NJ

"We went with Balance Point from a big company about six years ago. Every payroll company has basically the same programs. What is different about Balance Point is their EXCELLENT CUSTOMER SERVICE. You always get a live person on the phone and if there is ever a problem, it is fixed immediately. Their customer representatives are always available to answer questions and give support, not just give you a reference and not solve your problem or give you the answer to your questions. Balance Point is always trying to come up with different ways to make my job as the owner of a small company easier. Last year alone they put programs in place that saved me many hours of tedious boring financial work. Balance Point is a young innovative company who know their cliental and keeps up to date with all the new programs that save us time and money."

- Francesca, Fairfield, NJ

"Our company switched to Balance Point beginning January of this year and payroll has been so much easier! The program provides more flexibility in the reports I need and the way in which they're formatted. Navigating the screens is simple as well. Balance Point is able to make my high-volume payroll a smooth process because of its wonderful staff. They are always one step ahead of me, they are pleasant to speak with, and they're available when I need them. Balance Point was a move in the right direction for us, and I highly recommend them."

- Charlene, New York, NY

"I am happy to let you know that we are very happy with Balance Point. In fact, our payroll person, just mentioned to me how smooth and worry free the new system works. He said that all changes, problems and questions are dealt with in a very speedy manner. Technically the program is very much superior to what we were using at _____. In addition, the transition went well and was, pretty much, a hitch free process. So I congratulate you on you fulfillment of promise and your part in exacting truth from advertising! Looking forward to a long relationship. Thank you."

- Denise, HR Manager

"I am extremely satisfied with the service at Balance Point. I would (and have) recommended your firm to anyone (and everyone). You can use my name anytime to promote your service - you guys are everything you said and more."

- John, CFO

"Our company has been using Balance Point since 2004 and we are extremely happy with them. Their level of customer service and ability to comply with any request I may have is above reproach. Your questions will always be answered politely and in a timely manner. I am sure you will be as satisfied with them as I am. Take care and be confident you have definitely made the right choice."

- Dianne

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BALANCE POINT



The partners of Balance Point Payroll are, from left: John Egan, Pete Luciano, Dave Magen and Jess Cary.

Delivering More than a Paycheck

Balance Point Payroll

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Email: info@balancepointpayroll.com

Web: www.balancepointpayroll.com

No. of Employees: 22

Top Executives: John Egan, Jess Cary, Pete Luciano, Dave Magen: Partners

Product/Service: Payroll Services, Time & Attendance, HRIS

Year Founded: 2003



BALANCE POINT
The Next Level of Payroll Solutions

Years of experience inside a large payroll company taught them what customers needed and appreciated.

But Jess Cary, John Egan, Pete Luciano and Dave Magen knew they would have to start their own company if they wanted to deliver services most effectively and develop great relationships with their customers.

So six years ago, the four men founded Balance Point Payroll. The Glen Rock-based company combines their decades of experience with state-of-the-art technology and personalized service—all wrapped together in a cost-effective package that appeals to cost-conscious companies.

“We offer a unique blend of quality service, high-level technology and value,” says Pete Luciano, one of the firm’s four partners. Balance Point serves clients in 35 states, including New Jersey. Clients typically have between one and 500 employees and run the gamut from white collar to blue.

Great service starts with employing customer-service representatives who aren’t burdened with a long list of clients. That allows them to focus on each client and build the kind of relationship that ensures companies get what they need, when they need it.

Balance Point also sets a base fee that is predictable from month to month, says partner John Egan. Because the company doesn’t have to answer to Wall Street, it can avoid tacking on unexpected fees and surcharges.

“We don’t satisfy shareholders,” Egan says. “We satisfy clients by providing a wealth of value-added services.”

That includes service beyond simply cutting payroll checks. Balance Point has struck up a range of strategic alliances with other service providers,

including insurance brokers, HR consultants and wealth managers.

Larger payroll vendors offer the same services in-house, but that dilutes their value, Luciano says. By tapping one of Balance Point’s partners, clients can go right to a decision-maker—and avoid the red tape of a corporate bureaucracy.

Another complement to Balance Point’s exceptional service is its technology, which is always evolving. For instance, Balance Point now offers a Web-enabled Employee Open Enrollment Portal that integrates payroll and other HR information to create a seamless flow of data. The platform helps companies save money by reducing the time they spend manually entering and reentering the same information on different forms.

“It’s really going to cut down on the paperwork and improve the accuracy of information from the moment an employee is hired,” says partner Jess Cary.

The technology is even accessible to small companies that previously might have thought such efficiency was priced out of their reach, Cary adds.

Balance Point customers also have the option of dispensing with paper. But they can control the process to ensure they still find the level of service they need, says partner Dave Magen.

For Balance Point, customization is the key to satisfied customers.

“A lot of companies out there can cut your checks and pay your taxes and perform ACH services,” Magen says. “But not a lot of companies are looking to interface with your accounting software, create custom 401(k) file transfers and create the reports that your company relies on to be successful.” ■



BALANCE POINT

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Balance Point is a SAS 70 Type II audited and compliant organization.

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