

## Be the Go-To Guru:

Grow Your Value with a Partnership Powered by ADP's Unmatched Expertise, Insights and Solutions.



## **TABLE OF CONTENTS**



Enhancing the expertise that makes you essential to your clients' success.



Expert support when you need it.



The most complete set of solutions.



Quick and easy insights from Accountant Connect.<sup>™</sup>



The most flexible partner models



What our accountant partners are saying

# Enhancing the expertise that makes you essential to your clients' success.

Today's clients are looking for more than simply transactional services. They want your guidance on simplifying processes, generating more revenue and providing great employee and customer experiences. And no other partner can offer your firm everything we can to grow your value to your clients.





Whether you want to grow your traditional tax & accounting business or pivot to more strategic advisory services, ADP's tools can free up your time and enhance your service offerings to deliver real business value, so you can do more for your clients — and more for your firm. Here's how:



**Expert** support



Quick and easy insights



The most complete set of solutions



Flexible partner models



Drawing praise from the accounting community & beyond. View our Awards









## Expert Support

At ADP, we've got yours and your clients back with access to dedicated service and expert support with a human touch.





Quick and easy insights



The most complete set of solutions



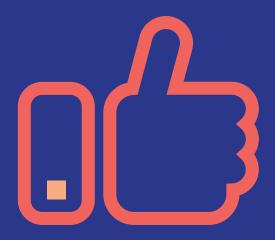
Flexible partner models











## Quick and easy insights

Easy access to client and industry insights via tools like Accountant Connect<sup>SM</sup> to let you show clients you really know them and the challenges they face.



Expert support



Quick and easy insights



The most complete set of solutions



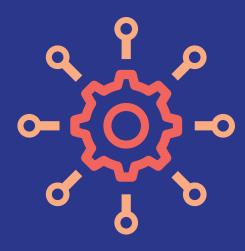
Flexible partner models











### The most complete set of solutions

Become indispensable to clients of all sizes with comprehensive human capital management (HCM) solutions that offer unmatched industryleading data, technology and service.



Expert support



Quick and easy insights



The most complete set of solutions



Flexible partner models











### Flexible partner models

No matter the size of your firm, or how you choose to offer payroll, HR & benefits solutions, we have a partnership model that can best enhance your services.



Expert support



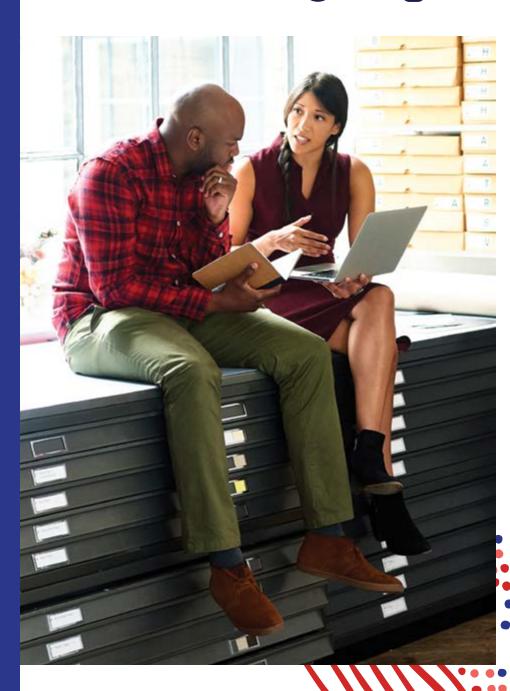
Quick and easy insights



The most complete set of solutions



Flexible partner models







## Drawing praise from the accounting community & beyond.



#### **American Business Awards**

2020 Gold Stevie Achievement in User Experience



**RUN** Powered by **ADP® Payroll for Partners** 2016-2019 Perfect 5-Star Rating



#### **CPA Practice Advisor**

2017-2019 Technology Innovation Award





#### **Accounting Today**

2017, 2019, 2020 Top New Product



## Expert support when you need it.

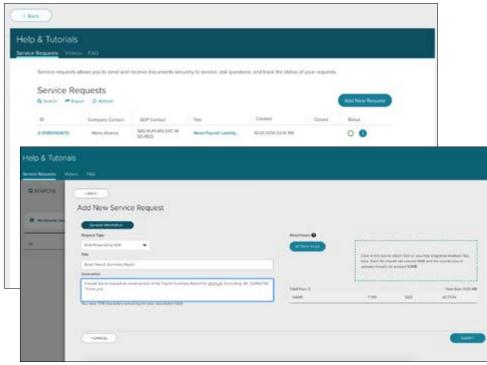
Get the information you need fast, with experts ready to help at a moment's notice.





The Accountant HelpDesk features dedicated payroll and HR experts specially trained to support professionals like you, available through live phone support and email.

And, with the new Service Requests feature in Accountant Connect, your firm can easily send and receive documents securely with our Accountant HelpDesk team, ask questions and track the status of your requests.



In addition, you can expect an ongoing relationship with your ADP Sales Associate, who's readily available to address your concerns and respond to your questions in detail.

# The most complete set of solutions; at your service.

From stand-alone technology to full-on outsourcing, ADP's HR solutions are designed to work the way you — and your clients — work.











ADPIA Services

Plus time-saving integrations to make accountants' lives easier



Accounting Software



ADP Marketplace



Marketing Support







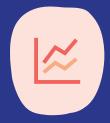
## Stand-alone services

Start with payroll and easily add on integrated services as your clients need them.





**Payroll** 



Data & Analytics



Workers' Comp and Business Insurance\*



**HR Services** 



Health & Benefits\*



Retirement



**Talent** 



Tax Credits



Time & Attendance



Outsourcing Options





## Leave payroll to us

Leverage the benefits of working with the payroll experts.



Payroll processing that's faster and easier locally and globally



Certified, experienced payroll professionals available 24/7\*



Employee and manager self-service — online or with our mobile app



Simple integration with business software, time tracking, HR systems and ERPs



Payroll services built for your organization's size

See how we can make payroll work better for your organization.

Payroll for 1-49 **Employees** 

Payroll for 50-1.000+ **Employees** 





Workers' Comp and Business Insurance\*



Health &



**Talent** 



Time & Attendance



Data & **Analytics** 





Retirement



Tax Credits



Outsourcing **Options** 





## Automatic Data Processing Insurance Agency, Inc. (ADPIA®): Trusted by businesses across the country



Workers' Comp and **Business Insurance\*** 





Running a business is hard work. Given all the energy invested in growing a company, making sure it's protected matters. ADPIA® licensed agents have been helping companies like yours find the right coverage to protect their business and employees.

#### Count on ADPIA for knowledge, service and convenience

ADPIA has decades of experience helping businesses find workers' compensation, business and group health insurance.

- Guidance from experienced, licensed insurance agents
- Reliable service when you need it
- Convenient access to certificates of insurance 24x7
- Time and money saving solutions that integrate with ADP payroll





## Finding the right business insurance just got easier



Workers' Comp and Business Insurance\*





The coverage you need. The experience you deserve. The convenience of one partner to help with it all.



#### Workers' Compensation

Required in most states, workers' compensation protects your business and employees from losses due to workplace accidents.



#### **Business Insurance**

Protection to meet your needs including General liability, business owner's policies (BOP), professional liability, commercial auto and umbrella coverage.

#### We make choosing the right coverage easier

Whether you're starting up a new business or re-evaluating your existing insurance, ADPIA has the knowledge, tools and resources to help you make smart choices.





## When it comes to group health insurance, your business should benefit too.



Workers' Comp and Business Insurance\*



Health & Benefits\*



Group health is the #1 benefit that employees desire when evaluating a new role. Group health insurance helps to keep your employees healthy and productive.



#### Stay competitive

Employees want to work for companies with the best compensation and benefits. Offering a comprehensive employee benefits package can help you attract and retain top talent.



#### Increase productivity

A healthy workforce can be a more productive one. Group health insurance helps create a healthy environment through prevention and wellness.



#### **Enjoy lower rates**

Group health insurance is typically more affordable than an individual policy. Businesses generally enjoy lower premiums because the more people in an employer health insurance plan, the lower the health insurance costs for everyone.





Attract incredible people, then propel them toward high performance

We're here to help support your HR journey — for businesses of all sizes, and across industries.



#### **Recruiting & Hiring**

Whether you're hiring full time employees or contractors, RUN Powered by ADP with ZipRecruiter has you covered. Together we deliver a seamless talent acquisition experience that not only identifies the best candidates but also onboards new employees and helps them thrive in the workplace. You only get one chance for a first impression, let ADP help your organization with:

- Recruiting
- Hiring
- Onboarding

#### Management & Growth

Develop the very best leaders and teams Top-performing organizations depend on highperforming leaders and teams. Give your leaders the tools they need to be effective with powerful, easy-to-use platforms and programs:

- Performance
- Succession
- Skills Development
- Compensation



**Payrol** 



Workers' Comp and Business Insurance\*



Health & Benefits\*



**Talent** 



Time & Attendance



Data & Analytics



HR Services



Retirement



Tax Credits



Outsourcing Options

#### 17







## ADP® Time & Attendance: Complete, Easy, Secure

ADP Time & Attendance is integrated with RUN Powered by ADP® so there's no need for multiple logins or passwords. And since the solution is hosted in the cloud there's no software to install or additional computer hardware to maintain. All you need to get started is an Internet connection and Web browser.

#### Key features include:

- Flexible data collection options:
  - Mobile device
  - Time clocks
  - Web time sheets
  - ADP Time Kiosk
- State of the art security

- Enhanced payroll efficiency
- Greater accuracy
- Improved labor and overtime insight
- Increased productivity through self-service
- Convenient time off tracking
- Easier scheduling



Reduce your labor costs, enhance your efficiency

When you automate your time and attendance function you can achieve substantial savings in time and productivity.



**Payroll** 



Workers' Comp and Business Insurance\*



Health & Benefits\*



**Talent** 



Time & Attendance



Data & Analytics



Services



Retirement



Tax Credits



Outsourcing Options

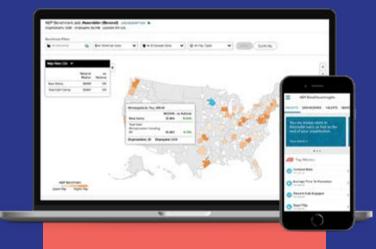






Imagine having a tool at your fingertips that helps you make smart decisions for your organization. Something that draws upon aggregated, anonymized and timely HR and compensation data from nearly 30 million workers in more than 90,000 organizations across the country. Something that lets you see how your company compares to others in regard to overtime, turnover and compensation — and then helps you take appropriate action.

That's ADP DataCloud: A powerful, intelligent set of data analysis tools exclusively from ADP.



## ADP® DataCloud features and benefits

Reporting and Analytics
Benchmarking
Data Explorers
Executive & Manager Insights





Workers' Comp and Business Insurance\*



Health & Benefits\*



Talent



Time & Attendance



Data & Analytics



HR Services



Retirement



Tax Credits



Outsourcing Options





## HR Services we offer

#### HR Resources

#### Save time with HR best practices, on demand

Tap into the HR expertise you need, so you can focus your valuable time where it's needed most. Our services include:

- HR HelpDesk
- Quick HR answers
- HR forms and documents
- Employee handbook wizard
- Job description wizard
- HR checkups

#### HR Guidance

#### Improve HR operational efficiencies

Confidently navigate your next major change with the help of ADP consulting and professional services. Our experts will analyze your human capital management (HCM) processes, then recommend best practices for your industry that allow you to become more efficient — freeing up time for you to focus on the heart of your business.

#### HR Processes

#### Optimize your HR processes

Maximize your HR processes across payroll, compliance, talent management and other HCM practices with consulting from ADP.

#### Some of the ways we can help include:

- Evaluating payroll and core HR administration processes
- Providing benefits administration support
- Reviewing time processes
- Setting up employee self-service
- Evaluating benefits programs and compliance tracking and reporting
- Providing customized training and best-practice recommendations

#### Dedicated HR Support

#### HR services support when you need it

Because you can't predict every workforce challenge you'll face, and you don't always have the time or staff on hand to learn every HR nuance, having a dedicated partner that understands HCM for your industry and your business can be a safe — and productive — bet.





Workers' Comp and Business



Health &





Time & Attendance



Data & **Analytics** 





Retirement





Outsourcing Options





## Unleash your inner superhero with ADP's retirement plan solutions.

Few things are more complex than offering and administering retirement plan benefits. That's why you need a provider with a legacy of delivering successful retirement plans.

With ADP Retirement Services, you can confidently recommend our retirement plan solutions because we're an independent, objective provider.

#### Innovation

It's in our DNA. We never stop innovating powerful solutions that help drive plan success. Like mobile technology that engages participants and makes saving more accessible.

#### Risk Mitigation

Comprehensive plan automation delivers greater accuracy to help reduce the risk of plan administration errors saving your clients time and money.

#### Service

We provide flexibility and exceptional service to our clients because that's the smart — and right thing to do.



401(k)



SIMPLE IRA





**Executive Deferred** Compensation (EDC)





Workers' Comp





**Talent** 



Time &



Data &







Tax Credits



Outsourcina

#### For Institutional Professional Use Only







## Giving you (tax) credit where credit is due.

Clients count on your tax expertise, but does that expertise include workforce-related tax credits? Now it can. With ADP's tax credits and incentives program, you can help eligible clients take advantage of ADP's experience and technology focused on capturing available credits to help lower their effective tax rate. Some of the major opportunities are:



Work Opportunity Tax Credit (WOTC) — This federal program gives employers up to \$9,600 in tax credits per eligible new hire from certain groups who have historically faced barriers to employment, such as veterans and those living in disadvantaged or low-income areas.



**Research and Development Tax Credits** — This federal tax credit encourages investment in the development and/or improvement of products, processes and technologies in the U.S. It allows eligible companies in manufacturing, product, software, and more to receive a tax reduction. Many states may also offer R&D tax credits for qualifying research performed within their borders.



**Economic Development Services (EDS)** — Every year, state and local governments award billions of dollars to attract, retain and grow facilities, jobs and investments. ADP offers negotiation, compliance administration services and a platform to help your clients navigate the complex world of economic development incentives.



**Employee Retention Credits** — Do you have clients impacted by one of the many recent natural disasters in the U.S., including the COVID-19 pandemic? Current legislation relating to these events offer employee retention tax credits for employers who continue to pay employees while experiencing a business impact. ADP continues to monitor this evolving legislative activity that may impact your clients.





Workers' Comp





**Talent** 



Time & **Attendance** 



Data &





Retirement



Tax Credits



Outsourcina





## HR Outsourcing (HRO) services



#### Two outsourcing options: Get what works for you

Whatever your business size or industry, when you choose outsourcing with ADP®, you gain premium service and support, as well as proven processes and technology.

Our two options are designed to get organizations like yours just what they need:



Human Resources
Outsourcing



Professional Employer Organization (PEO)



**Payroll** 



Workers' Comp and Business Insurance\*



Health & Benefits\*



Talent



Time & Attendance



Data & Analytics



HR Services



Retirement



Tax Credits



Outsourcing Options





## HR Outsourcing (HRO) services



### **Human Resources Outsourcing**



### Professional Employer Organization (PEO)



Leverage sophisticated software, plus expert service to tackle your HR challenges.

#### Let us handle the complexity of human resources

Human resources touches so many areas of your business: benefits administration, time and attendance, talent management, even payroll. So instead of fighting to stay on top of it all, imagine what life would be like with:

- Lower expenses for human resources staff, infrastructure, and technology
- Human resources teams freed up to focus on more strategic tasks
- Improved overal operations through streamlined processes
- Access to one of the best technology platforms in the outsourcing industry
- Lower exposure to risk and compliance regulations

Yes, this is possible. From one provider. With an all-in-one approach to HR BPO.









**Human Resources Outsourcing** 



## Professional Employer Organization (PEO)



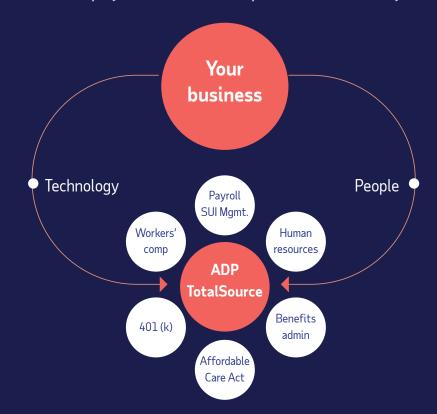
Receive dedicated guidance and all-in-one technology to help you manage your HR, talent, benefits and risks to achieve concrete results.

## Co-employment: HR partner that shares liability, and provides expert guidance, administration and technology

In a co-employment partnership, the Professional Employer Organization (PEO) becomes the employer of record for your business' employee administration. In addition, your business gets expert guidance and advanced technology for HR, talent, payroll, benefits, workplace safety and compliance.

Your employees will enjoy benefits — like medical, dental, vision and 401(k) — similar to those of a larger company.

In a co-employment model the HR partner handles it on your behalf.







## Time-saving integrations to make accountants' lives easier



Accounting Software



ADP Marketplace



Marketing Support

Our general ledger integrations will help you effortlessly map your clients' general ledger, and easily import pay data, saving you time and reducing errors. Connect ADP to your favorite accounting software or create a .CSV file.







General ledger interfaces also available for Sage 50, Sage Intacct and Accounting CS®







## Time-saving integrations to make accountants' lives easier



**Accounting Software** 



**ADP Marketplace** 



Marketing Support

ADP Marketplace connects you and your clients to hundreds of leading business software applications to help boost employee engagement and maximize productivity. Easily integrate ADP platforms with best-of-breed apps for time tracking & scheduling, expense management, benefits, collaboration and more, right from your Accountant Connect dashboard



Log into Accountant Connect or visit apps.adp.com to explore all ADP Marketplace solutions.

















## Time-saving integrations to make accountants' lives easier



**Accounting Software** 



**ADP Marketplace** 



▶ S Marketing Support

You're a savvy accounting professional, but marketing may not be one of your strengths. Our Accountant Marketing Toolkit, powered by CountingWorks PRO, can help you quickly get the word out on your firm's services to existing clients and new prospects:



Customize marketing brochures and videos



Customized firm profile on TaxBuzz.com



Client letter templates & other white-label content

Register for free at adp.countingworkspro.com



Simple & Automated 360° marketing One platform, endless opportunities for growth.



Search

Engine

Optimization





Websites

Reputation < building



Lead & O Management

client portal appointments

and eSign

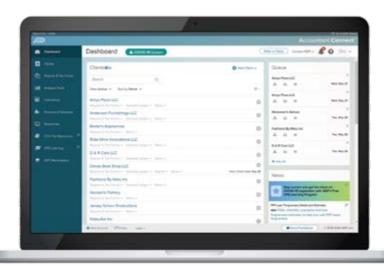
## Quick and easy insights from Accountant Connect.

How can you stay on top of your game and still have time to think more strategically? Accountant Connect is ADP's award-winning, multi-client payroll management and analytics platform — and a remarkably effective tool for adding value to every client engagement.

Play Accountant Connect Video



By leveraging Accountant Connect's tools and resources, you can strengthen strategic advisory services while boosting the efficiency of your traditional tax & accounting services, positioning your firm for increased growth and revenue in the years ahead.





Tools to help drive firm efficiency



Tools to strengthen advisory services



With over 90% of businesses interested in receiving consulting or advisory services from their accountant, your firm's growth potential is huge.<sup>1</sup>









## Tools to help drive firm efficiency



Enhance your reporting capabilities with super-fast access to critical client information, including authorized clients' payroll data & tax forms, payroll trends and time-sensitive notifications for your RUN Powered by ADP®, ADP Workforce Now® and ADP TotalSource® clients



Conveniently generate or **schedule multi-client payroll reports** for the data you need, precisely when you need it



Quickly add clients to your dashboard and refer new ones



Effortlessly process payroll for your clients— whether it's occasionally to process annual S corp payrolls or help a busy client, or regularly with RUN Powered by ADP® Payroll for Partners, our white-label payroll and HR software for accounting professionals



Leverage payroll, tax and retirement calculators and other practice management tools



Easily map your clients' general ledger and import pay data directly into your favorite accounting software









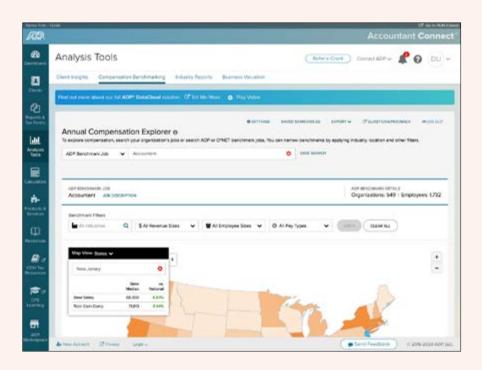


Compensation Benchmarking, powered by

ADP® DataCloud. to understand compensation trends and help clients stay competitive

#### How can compensation benchmark data benefit your firm & clients?

- Gives your firm access to exclusive compensation insights from ADP's payroll database
- Provides your clients with accurate insights about real trends in compensation – comparing them to similar companies, as well as the greater market
- Helps them make smarter, more informed business decisions, while expanding higher-value consulting and advisory services for your firm

















**Client Insights** providing data-driven tips and emerging trends you can use to recommend additional integrated ADP solutions when the time is right

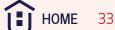
200+ IBISWorld® industry reports to better understand client-specific verticals

An on-demand business valuation tool powered by BizEquity















Complimentary CPE courses on timely topics keep you up-to-date on the latest policies and practices,

An extensive catalog of courses for CPAs and EAs is available in a variety of formats, from live webinars to on-demand selfstudy videos. Access today at cchcpelink.com/adp.





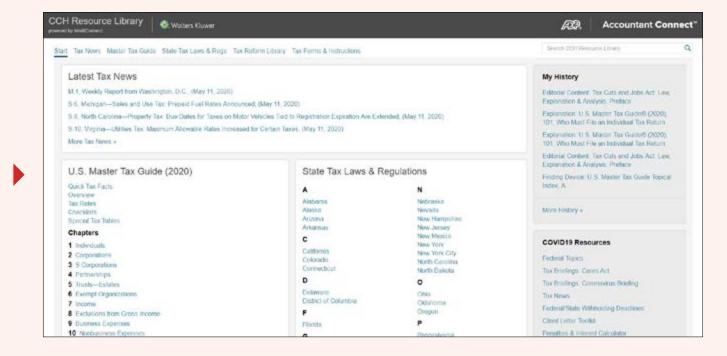








Wolters Kluwer **CCH** Resource Library, Powered by IntelliConnect, complete with 20 years of U.S. Master Tax Guide history, state laws and regulations, IntelliForms library, client letter toolkit, timely legislative updates including COVID-19 tax resources & much more



# Most flexible partner models — choose what works for you.

Work your way, because no two accounting firms are the same. Whether you want to white-label our payroll services, get rewarded for referring your clients or even hand off payroll duties altogether, we've built flexibility into our partnership model so you can choose the one that works for you.









Offer payroll processing



Turn your payroll client base into revenue



Not sure what works best for you? Take our payroll assessment









### Refer Clients

Focus on trusted advisory services and stay connected with Accountant Connect as we expertly manage payroll, HR and more for your clients of all types and sizes.



Refer clients



Share revenue for referrals



Offer payroll processing



Turn your payroll client base into











### Share revenue for referrals

Reap the benefits of our robust referral program, including revenue sharing & access to complimentary practice resources. Not to mention powerful marketing support to help grow your practice with our free and easy-to-use Accountant Marketing Toolkit.



Refer clients



Share revenue for referrals



Offer payroll processing



Turn your payroll client base into









## Offer payroll processing

Create year-round revenue with white-label client payroll processing and HR management using RUN Powered by ADP® Payroll for Partners. You'll also receive powerful marketing support to help grow your practice with our free and easy-to-use Accountant Marketing Toolkit.



Refer clients



Share revenue for referrals



Offer payroll processing



Turn your payroll client base into









### Turn your payroll client base into revenue

Already offer full-service payroll and want to know what it's worth? Ask for a confidential valuation and strategies for a successful exit.



Refer clients



Share revenue for referrals



Offer payroll processing



Turn your payroll client base into revenue







## What our accountant partners are saying

66

Using Accountant Connect, we were able to proactively pull CARES Loan Report Packages for 170 of our ADP payroll clients in an hour and send them out along with appropriate guidance. More than half of those clients ended up applying for a PPP loan, and 100% of them successfully secured funding quickly. None of that would have been possible if it weren't for ADP's lightning quick response to the COVID-19 crisis

Matt Soderman, CPA Client Accounting Services Manager, Baker Tilly



66

In the past 18 months with the help of RUN Payroll for Partners, the firm has increased revenue by nearly 200 percent, grew from 4 to 15 employees, and experienced its first year as a \$1M firm.

Blake Shaffer Founder and CEO, LWS Tax & Accounting



66

Not only do firms get to choose the type of relationship they want to have with ADP, they also get tools that change the **game** for a smaller firm.

Heather Satterley, CPA, EA, MSI Founding Partner, Backoffice Ally, LLC



**Accountant Connect** is rapidly becoming a 'go to' resource for our firm. Each time we log in, we feel like it continues to evolve. ADP continues to create new and innovative tools that we can use to further differentiate ourselves from our competition.

> Sean M. Duncan, CPA President, SMD Consulting & Accounting, LLC











## What our accountant partners are saying

66

I have all 25 of my clients set up on Pay-By-Pay® - and it's been great. Pay-By-Pay helped me reduce administrative tasks and focus more on being consultative with my clients.

Sharrin Fuller CEO, A Simple Office Solution





With ADP, we can just focus on servicing our clients, which has been a big benefit for us. And we never have to worry about sending our clients to them because they're so welcoming. It's not just payroll, because they have an arm in everything. It's like one-stop shopping for any small business.

> Jonathan Nguven Co-owner, RNH, LLP





If I was going to transfer the payroll practice to anyone, it was going to be ADP because they were the people that I trusted the most ADP made it so I could go on to do the things I wanted to do, and increase my growth 40% in just this past year.

> Lewis Andrews Owner, Andrews & Company





After talking with ADP, we were sure that they were going to be able to provide the type of service to our clients that we were giving them through the years.

Donna Aul Co-owner, Northend Tax & Accounting





## What our accountant partners are saying



Accountant Connect lets us work more efficiently with one-click access to our client data and tax research. No matter what size firm you're at, it's really a game-changer.

> Michael Barbera, CPA Partner, Edelstein & Company





We meet and work together - as a team - to try and make everything we do result in the best experience for the client. It's that **level of trust** with ADP that's allowed us to help best serve our clients.

> Jason Pourakis, CPA Partner, Mazars USA





In our first year alone, ADP allowed us to grow our firm by 39%. We would not have been able to do that if it weren't for RUN Payroll for Partners.

> Steve Roderick Owner, Roderick's Payroll and Bookkeeping Service

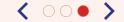




Each pay period we're saving on average 15-30 minutes per client, per month thanks to Accountant Connect and ADP's seamless integration with QuickBooks.

Jennifer Brazer Founder and CEO, Complete Controller







## No matter how you choose to engage, ADP will help you and your clients achieve new levels of success.

Visit adp.com.accountant to learn more and get started.