

5LINX PAYROLL



ORLANDO



AGENDA

- Who is Optima Benefits & Payroll?
- What is the relationship between Optima & 5LINX?
- 5LINX Payroll advantage
- Why are we better?
- Process
- Overcoming objections
- Questions



WHO IS OPTIMA?

- Family-run business in Rochester, NY
- Serves large and small businesses throughout the United States
- Customer-driven relationships
- Independent
- Cost-effective





Frank DiCesare
President



Jason DiCesare
Vice President, Payroll



Brandon DiCesare
Vice President, Benefits

ABLE TO MEET NEEDS AND DEMANDS OF:

- Payroll
- Human resource compliance
- Benefits administration and outsourcing
- Time and attendance solutions
- Integrated 401K solutions

Optima is the payroll and benefits partner delivering the most resourceful and insightful solutions to help you define success.

Optima delivers the most robust, integrated, customized, and cost-effective business solutions that will address the needs and demands of payroll, human resource compliance, benefits administration and outsourcing, as well as time and attendance solutions to businesses across the United States.



Collaboration & Client Service are at the core of how we run our business.

Optima believes in customer-driven relationships.

We believe in performance.

Through strategic partnerships and technology acquisitions, Optima offers competitively priced alternatives for small-to-medium sized business owners who are looking to not only spend less on payroll and benefits management for themselves and their employees, but for greater personal service, customized solutions, trust and responsiveness to questions and concerns.

It all comes down to a **focus on you and your business.**

WHAT IS THE RELATIONSHIP BETWEEN OPTIMA & 5LINX?

- Optima and 5LINX have partnered to create 5LINX Payroll
- Optima is the exclusive payroll provider for 5LINX and thousands of clients across the U.S.
- This allows representatives to provide clients a robust and streamlined approach to their current payroll systems



5LINX PAYROLL ADVANTAGE

5LINX Payroll offers the most cost-effective business solution to address your clients' payroll, human resource, and benefits needs.



5LINX PAYROLL ADVANTAGE

Spend less time and money on payroll processing with these important key features:

- Online/
Cloud-based
- Tax & compliance services
- Full-service direct deposit
- Tax payments
- Time-off accrual & reporting
- Pay-as-you-go
Worker's
Compensation
insurance



PROCESS

Step 1: Identify a prospect.

Step 2: Find out their current payroll process.

Step 3: Obtain invoice.

Step 4: Complete & Submit referral form.
(include invoice)

WHO IS A GOOD PROSPECT?

- Business owner with 1-50 employees
- Employers looking to free their time to concentrate on their business
 - They hire accountants, attorneys, brokers, payroll providers, etc.

WHO IS A GOOD PROSPECT?

- Any small business can benefit from a payroll company helping them process their payroll and make their tax payments using an easy streamlined process
- Many companies already use a payroll service; we are looking to help these companies keep the same services but at a lower cost

CURRENT PAYROLL PROCESS

Does the company currently do their own payroll, or do they outsource it to a payroll company?

- Optima takes away the time burden of processing payroll and tax liability by filing the company and employee taxes in a timely manner
- For companies already using a payroll service, Optima will help them keep the same services they are already accustomed to, but with a personal touch and a lower cost

COMPETITION

PAYCHEX[®]

Payroll • HR • Retirement • Insurance

ADP[®]



COMPETITION

Why are we better?

There's no question Paychex and ADP have a huge market share of the payroll business, but that's an advantage for us.

We are able to provide:

- **BETTER SUPPORT** because we're smaller and care more about each of our clients
- **LOWER COST** – We don't have shareholders who need to make more profit year over year, so we charge a fair rate for the same services
- **CUSTOMIZATION** – We can tailor to each client's needs



INVOICE

- The invoice provides all the information we need in order to understand what services they're currently using with their provider
- We can then tailor our quote around those services and typically provide a quote that is much lower than what they're paying
 - On average we're 25-30% lower with no loss in services
- We also need the invoice in order to guarantee savings – WE will be lower priced

PAYCHEX

Paychex, Inc.
 1565 Jefferson Rd., Suite 210
 Rochester NY 14623

Client # 0017 0017-8092
 Invoice # 2010082600

AUTOMATIC PAYMENT \$376.45

This amount will be deducted from the following bank account at or after 12:01 A.M on 9/10/10.

ADDRESS SERVICE REQUESTED

0017 0017-8092

XXXXXXXXXX
 XXXXXXXXXX
 XXXXXXXXXX
 XXXXXXXXXX

XXXXXXXX4305

For questions regarding your account, please call (885) 444-2700.

Page 1 of 1

ACCOUNT SUMMARY				AMOUNT
Previous Balance on Invoice#2010072900 Due 08/10/10				274.83
Payment Received - Thank You				-274.83
Balance Forward				0.00
Total New Charges				376.45
Account Balance (includes Balance Forward, New Charges, and Pending Automatic Payments)				376.45

CHECK DATE	DESCRIPTION OF SERVICE	PROCESSING DATE	# TRANSACTIONS	AMOUNT
	NEW CHARGES			
08/13/10	Small Business Package	08/10/10	18	120.00
	Distributed Earnings			3.75
	New Hire/Change Transmission		1	3.50
	Paychex Worker's Compensation Service			13.00
08/27/10	Small Business Package	08/26/10	39	212.58
	Distributed Earnings			3.75
	New Hire/Change Transmission		2	7.00
	Postage And Handling			12.87
	Total New Charges			376.45
	Automatic Payment (includes New Charges and applicable credits from Balance Forward above)			376.45

Small Business Package includes: State Unemployment Insurance, Payroll Processing, Taxpay® Service, Direct Deposit Premium Processing, Flexible Payroll Package D



SLINX International Event

Client Number:
791603

[REDACTED]

For Billing inquiries, please contact your client service rep at (877)854-0379.

Current Information ***CALL MONITORING***

Please be advised that calls to and from ADP may be monitored or recorded for business and quality assurance purposes.

Current Charges	RUN	Company Code	1716-2R-MFE	IID	21097469	
	Processing Charges for period ending 03/15/2015					
	2 ADP Enhanced Payroll					discount applies 57.00
						Payroll Features include: Multiple Employee Pay Options Tax Filing New Hire Reporting eTimecard Electronic Reports Employee Access RUN Powered by ADP mobile payroll General Ledger Interface Garnishment Payment Service Unemployment Claims Service (SUU) Poster Compliance Update Service 24x7 Live Support
	Processing Charges for period ending 03/22/2015					
	2 ADP Enhanced Payroll					discount applies 57.00
						Payroll Features include: Multiple Employee Pay Options Tax Filing New Hire Reporting eTimecard Electronic Reports Employee Access RUN Powered by ADP mobile payroll General Ledger Interface Garnishment Payment Service Unemployment Claims Service (SUU) Poster Compliance Update Service 24x7 Live Support
Total						114.00
49% Discount						-55.86
						Total debited 58.14

NO PAYMENT REQUIRED. This amount will be debited from your account # XXXXXX7949 on 04/03/2015 or the next banking day. When your account is debited, this invoice will be automatically paid in full.



WHAT WE NEED FROM YOU

In addition to a client invoice we will need a completed 5LINX Payroll Form

- Once complete, submit by:
 - Fax: 585-348-2119
 - email: payroll@5linx.com
- WE HANDLE THE REST!!!

5LINX Payroll | **Optima**
PAYROLL MADE SIMPLE | Benefits & Payroll

SECTION I) Business Information

Legal Business Name _____
Legal Business Address _____
City _____ State _____ Zip Code _____

SECTION II) Contact Information

Main Business Contact/Owner _____
Primary Phone _____ Secondary Phone _____
Contact Email _____

Do you currently run payroll? (Check one) Yes or No

Existing Payroll Provider _____
How Many Employees _____

What is your preferred method of submitting Payroll? (Check one) Online (self) phone fax email text

SECTION III)

<p>5LINX Rep Use Only: Please submit this form with the company's most recent payroll invoice.</p> <p>1. Via Fax (585).348.2119 2. Email: payroll@5linx.com</p>	<p>To be filled out by 5LINX Representative:</p> <p>5LINX PIN _____ 5LINX REP _____ 5LINX REP EMAIL _____ MOBILE PHONE # _____</p>
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Payroll Statement must be included to allow for proper quoting.

SECTION IV)

I, the undersigned hereby authorize Optima to contact me to discuss their services.

AUTHORIZED SIGNATURE OF BUSINESS CONTACT

DATE

OVERCOMING OBJECTIONS

Objection	Solution
Cost	Always the best price
Bonded and insured?	Up to 1 million dollars per incident
Hassle	Optima provides a seamless transition
Late payments/penalties	We are 100% liable