



Membership Application Calendar Years 2021-2022

MEMBERSHIP CATEGORY

- Retirement Recordkeeping Plan Service Provider
- Payroll Service Bureau
- Payroll Administration Software Firm
- Bundled Payroll Service Provider (software and service)
- HCM Suite with a payroll service or software component
- Data transmission or Middleware firm

ABOUT YOUR FIRM

Company name: _____

Website: _____

LinkedIn: _____

Twitter: _____

Retirement Plans Business

Number of plans recordkept: _____

Number of participants in client plans: _____,000

Total plan assets of client plans (as of 12/31/2020): \$ _____ million

Payroll Service

Number of payroll clients: _____

Number of employees of payroll clients: _____,000

Total Annual Payroll of payroll clients: \$ _____ million

Payroll Software

Number of payroll software clients: _____

Number of users: _____

MEMBERSHIP DECISION MAKER

Sal. First Name M.I. Last Name Suffix / Desig.

Nickname Title

Street Address Suite #

City State ZIP

Email @

(_____) _____ - _____ (_____) _____ - _____
Office Mobile

Twitter Handle

Preferred Instant Messaging platform:
 EZTalks Messenger Facetime iMessage Skype Slack WeChat Whatsapp

Instant messaging handle/number: _____

OTHER FIRM DELEGATES ON BIWEEKLY WEB MEETINGS

Sal. First Name M.I. Last Name Suffix / Desig.

Email @

(_____) _____ - _____ (_____) _____ - _____
Office Mobile

Sal. First Name M.I. Last Name Suffix / Desig.

Email @

(_____) _____ - _____ (_____) _____ - _____
Office Mobile

MEMBERSHIP BENEFITS

Deliverables

The following deliverables were offered in 2021, contingent on reaching \$100,000 in revenue. We are committed to delivering these in 2021 or 2022:

- Input into all Coalition activities
- Access to (and listing in) the Report of Company Contacts (contact information for member firms)
- 2 company representatives at all Coalition events
- 15 online meetings (5 for retirement plan service providers, 5 for payroll platforms, and 5 joint meetings)
- 1 in-person meeting* (2 registrations)
- 2 company practices reports (COPEX(k) for Retirement Plans; COPEX Pay for HCM/Payroll firms)
- 3 employer polls (\$10,000 sample budget)
- 4 VIEWPOINT papers
- Online demonstrations of employer workstations
- Strategy paper on data exchange / EDI methods (API vs. SMTP)
- 5 news releases to the trade media
- 30 social media posts (LinkedIn and Twitter)
- \$5000 budget for Social Media Advertising
- Your company logo and positioning statement on the website of the Coalition
- Other activities as budget allows and membership needs evolve

Additions for the extension of the program in 2022:

- Online Annual Meeting for current members on September 22, 2021
- The SCOOP magazine – 3 quarterly issues in 2021 and 4 in 2022
- 11 online meetings in 2022 (4 of retirement plan service providers, 4 of HCM/Payroll Service Providers, and 3 joint meetings)
- Recruit of a membership sales and member relationship development consultant with HCM / Payroll background
- EACH Enterprise online community app

****The in-person (hybrid) meeting will take place in the spring of 2022 (March, April, or May)***

MEMBERSHIP DUES

There is no additional cost for current members in 2022 – current members receive all benefits at no additional cost. Membership dues cover both 2021 and 2022 for current and new members.

For new members:

- Retirement Plan Service Providers \$5300
- HCM/Payroll Platforms/Others \$3700

PAYMENT

Please Invoice Us Pay by Credit Card

Name as it appears on the card

Credit Card Number

____/____
Expiration Date

CVV

Billing ZIP Code

Please return your completed Membership Application to:

Mr. Eric Henon
President
Coalition for Payroll Excellence
16 A Pasco Drive
East Windsor, CT 06088
(860) 254-5042
Fax: (860) 838-2830
ehenon@payrollexcellence.us