



Membership Application Calendar Year 2021

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

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 BI WEEKLY 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

- Input into Coalition activities
- Access to (and listing in) the Report of Company Contacts providing you updated contact information for member firms
- 2 company representatives at all Coalition events
- 18 online meetings (6 for retirement plan service providers, 6 for payroll platforms, and 6 joint meetings)
- 1 in-person meeting in September 2021 (2 registrations)
- 2 company practices reports (COPEX(k) for Retirement Plans and COPEX Pay for HCM/Payroll)
- 3 employer polls (\$10,000 sample budget - \$15,000 sample budget if total membership revenue exceeds \$120,000)
- 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 (\$10,000 if total membership revenue exceeds \$120,000)
- Your company logo and positioning statement on the website of the Coalition
- Other activities as budget allows and membership needs evolve

MEMBERSHIP DUES

- Retirement Plan Service Providers \$5300
- HCM/Payroll Platforms \$3700
- Enterprise (both) \$7750

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
61 Rainbow Road
East Granby, CT 06026
(860) 654-1705
Fax: (860) 838-2830
ehenon@eachenterprise.com