

VensureENGAGE  
Elevate / Educate / Empower

PLAYBOOK

[vensure.com/engage](https://vensure.com/engage)

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# About the Engage Playbook

The History Behind the Engage Playbook

Vensure Engage: What Is It?

About the Engage Playbook

The Vensure Mission

The Vensure Core Values — HORIZON

Vensure's History

Vensure By the Numbers

Understanding Your Role

Earning Referral Income

# Engage Playbook

## The History Behind the Engage Playbook

We developed Vensure Engage to empower employees to be a driving force behind the success of the Vensure family of companies. The Engage Playbook originated with our Division Partner, Avitus Group, and is an integral part of helping employees feel confident enough to offer solutions to clients as they listen and interact with them. With over 50 solutions to offer, there's a solution for everyone, and all clients and employees can benefit from Engage. Employees have the opportunity to earn rewards for inviting clients to consider additional services which will, in turn, simplify their business. The Engage Playbook is our way of inviting our employees to directly impact the growth and success of the company and their careers and equip them with the resources to be able to do so. I'm very proud that we are able to bring this incredible initiative to our Vensure family and hope everyone will take advantage of the amazing opportunity to be a part of our continued successes.

—Alex Campos, CEO



# Engage Playbook

## Vensure Engage: What Is It?

At Vensure, we are all about putting our employees first. Ensuring everyone in every department knows they are making an impact is why we developed this program. Engage is a program to **empower** employees through **educating** them on solutions Vensure has to offer—while giving you the opportunity to **elevate** your income at the same time. It's our goal to ensure employees feel they can have a positive impact on the company and the businesses they work with. Through the Engage program, you have the potential to directly impact Vensure's service delivery and bottom line, making you an integral part of the company's overall success, while learning all about what Vensure has to offer.

With Engage, you'll be **educated** on our 50-plus solutions designed to help business owners simplify their business, take that education and share it with current or future clients, and submit referrals for services to **elevate** your income. You'll receive a cash bonus if your referral closes, which is extra income in your pocket. With the right resources and potential to earn additional income, you'll feel **empowered** to be part of something bigger—the more you know about how Vensure can help clients be successful, the more empowered you'll be to refer solutions and earn extra bonuses.

# Engage Playbook

## About the Engage Playbook

Each employee receives this Engage Playbook, containing all the information you need to feel educated and empowered to communicate with current and potential clients, about any solutions you feel could help simplify their business. We know selling solutions might sound like a difficult ask—not everyone is comfortable with sales. But that's what makes Engage different. **You don't need to be a salesperson or an expert in all 50-plus solutions to take advantage of the program.** Everything you need is right here in this playbook.

Got a client who wants to offer their employees a retirement plan? Flip to that page on 401(k), and you'll have enough information to confidently talk to your client about this offering. Do you know a client that has been tracking their employees' time manually and could use our time and labor management offerings? Same thing! Just flip to the Employer Solutions section and review the information. Be empowered through this educational tool, then submit your referrals to elevate your income! Each service has a specific dollar amount that you will earn once the referral closes.

# Know Your Company

## The Vensure Mission

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**Our mission is to empower entrepreneurs to build stronger companies by providing innovative solutions and unparalleled service.**

We want every employee to feel empowered to take an active role in Vensure's continued success. It is our mission to elevate, educate, and empower employees to do the very same for our clients through the Engage program, and this Playbook is how. We're giving you everything you need, right here, on all 50-plus solutions so you can confidently approach anyone who might benefit from one of them—or more—and earn additional bonuses while positively impacting the company overall.

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We believe that businesses experience accelerated growth by partnering with the Vensure family of companies. Our solutions and processes are all designed to help business owners achieve their idea of success faster.

# Know Your Company

## The Vensure Core Values – HORIZON



### Vensure's History

Founded in 2004, Vensure Employer Solutions was built on the foundation of providing business owners with trusted PEO services. In less than 20 years, our company has grown to be the largest privately held PEO organization, with over 50 service offerings and more than 80 Division Partners. That growth didn't happen by chance, it has come with the dedication of our internal employees, who now surpass 5,000. It takes conversation and relationships to create the kind of impact we see at Vensure. Your efforts to serve our clients and worksite employees is exactly why Vensure Engage was created. Your recommendation of our company to your family, friends, and clients shows your commitment to Vensure, and we are excited to repay that commitment with payouts and rewards!

# Know Your Company

## Vensure by the Numbers

**9,500+**

Internal Employees

One of the Nation's  
**LARGEST**

HCM/HRO Organizations

**77**

Countries  
Served



**50**

U.S. States  
Served



**4.2M+**

Total Worksite  
Employees Served

**\$58B**

in Direct Annual  
Payroll Processing

**\$153B**

in HCM/HRO Annual  
Payroll Processing

**55+**

Locations in  
North America

**#1**

Largest Privately  
Held PEO

**105+**

Acquisitions

# Understanding Your Role

## You Don't Need Sales Experience!

Don't worry if you don't have any sales experience. This Playbook is your tool for accessing information on Vensure solutions to engage a client's interest. It's your personal, pocket-size resource.

Each solution has its own page with a detailed description. You regularly interact with clients, so when you hear them say something like, "We've been having a hard time finding the right talent," you can flip to the page on Recruiting Services and provide the right amount of information to engage interest. This shows that you are listening to their concerns, and have a solution!

Submit referrals online through [vensure.com/engage](https://vensure.com/engage) and complete the form with as much detail as possible. Once the client or prospect starts the service that was referred, you will receive a referral bonus on your first paycheck following 90 days post-start (the referral bonus will vary based on the service referred).

Have a question about Engage? Email [engage@vensure.com](mailto:engage@vensure.com).

## Quick Glossary for New Employees

**WSE** - Worksite Employee

**FTE** - Full-time Employee

**PEO** - Professional Employer Organization

**HCM** - Human Capital Management

**ASO** - Administrative Services Only

# Earning Referral Income

## Overview

Our favorite part of Vensure Engage is the opportunity to pay **you** for your dedication to both our company and our clients! It is our pleasure to reward and acknowledge you and your contributions. The process is easy and so is earning your reward! Visit [vensure.com/engage](https://vensure.com/engage) and follow the instructions on the page.

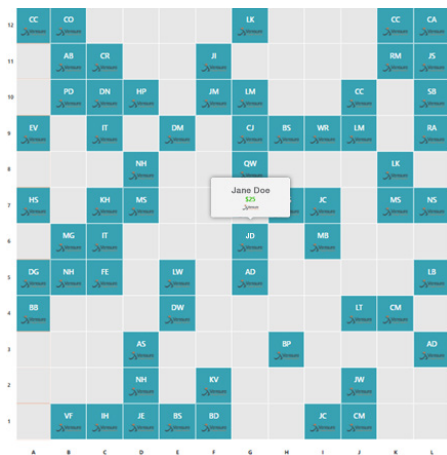
## Elevate Your Income

Once you submit a qualified referral, an assigned specialist will work with the referred business to close the deal. If they start using our solutions, you will receive a referral bonus based on the payout amount for the particular solutions referred. You can refer a client for multiple solutions and receive a payout for each one that closes!

Not only will you receive a payout when your referral closes, but you also have the opportunity to earn prizes for simply **submitting** a referral with our Engage Bonus Board!

Each square comes with a payout! After you submit a qualified referral, your name will randomly get added to a square on the Bonus Board and you'll have a chance to earn a prize! Prizes will be rewarded once the square is filled in.

# Earning Referral Income



Prizes will vary by square and, as more referrals are submitted, the Bonus Board fills in! The more often you submit qualified referrals, the more chances you have to win! Multiple referral submissions will get your name on the Bonus Board multiple times.

The Bonus Board will reset each contest period, or once the board fills up.

*\*Disclaimer: You can only get on the Bonus Board one time per referred business. You cannot get on the Bonus Board multiple times if multiple services are referred for one company. However, you will still receive the appropriate referral bonus for each closed solution you referred for each company. Employee must be employed at the time of distribution for all prizes.*

# Earning Referral Income

Here are the potential referral bonuses for each solution:

## Core Services

PEO Services .....	\$50/FTE Worksite Employees: \$4,000 Cap
HCM Services .....	\$25/FTE Worksite Employees: \$2,000 Cap
Payroll Services .....	\$10/FTE Worksite Employees: \$1,000 Cap
Global Employment Services .....	\$500 per Direct Client
Latin American Alliance .....	Please See Core Services Payout

## Employer Solutions

Traditional Recruiting Services.....	5% of Commissionable Revenue
High-Volume Recruiting.....	5% of Commissionable Revenue
HR Only .....	\$50
Alternative Workforce Solutions (BPO)...	\$100/Seat, \$1,000/Client Max
VensureHR Staffing Alliance.....	Please See Core Services Payout
Back Office Staffing.....	\$50/FTE Worksite Employees, \$4,000 Cap
PrismHR Tax.....	\$100
Cyber Liability .....	\$25 Vensure Swag Credit
Master Major Medical Plans.....	\$500
Employee Benefits Consulting .....	\$100
Broker of Record (BOR) .....	\$100
Ancillary Offerings.....	\$100
Telehealth .....	\$50
Vensure Direct Care Powered.....	\$50
Health Provider Pre-Qualifying Services .....	\$50
Retirement Planning .....	\$225
Time and Labor Management.....	\$100
Performance Management .....	\$100
Applicant Tracking.....	\$100
Employer Funding Solutions.....	\$50
Employment Screenings .....	\$50

# **Core Services**

**PEO Services**

**HCM Services**

**Payroll Services**

**Global Employment Services**

**Latin American Alliance**

# PEO Services



## Overview

PEO stands for Professional Employer Organization, and the relationship is often referred to as a co-employment relationship. Through this relationship, our clients delegate some of the most distracting parts of their business. This relationship bundles payroll, HR, benefits administration, and safety and risk management into one complete solution.

## Value Propositions

- › Makes running a business and managing employees much easier
- › Allows a business to focus on what they do best
- › Protects a business with necessary attention to payroll, HR, benefits, and safety requirements and responsibilities
- › Dedicated service experts help navigate clients through the many responsibilities they have

**Referral Payout on Close**  
\$50/FTE WSE with a \$4,000 Cap

# HCM Services



## Overview

HCM stands for Human Capital Management and is similar to PEO services but with less liability for Vensure. Whereas PEO clients are “co-employed” with Vensure, the HCM relationship is strictly consultative. Vensure still provides support with payroll and payroll taxes, HR, and safety administration and consulting.

## Value Propositions

- › Vensure’s HCM services offer access to our customizable, enterprise-level HR technology and service.
- › This service simplifies administrative processes, mitigates risk, and lowers operational costs.
- › This service offers the tools for our clients to stay on top of payroll and HR responsibilities.

**Referral Payout on Close**  
\$25/FTE WSE with a \$2,000 Cap

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# Payroll Services



## Overview

Vensure offers payroll processing and payroll tax services as a comprehensive payroll solution to various business needs. Payroll services include real-time access to the information employees rely on, such as online payroll service, payroll tax, and other payroll processing needs.

## Value Propositions

- › No need to schedule time off or vacations around payroll
- › Ability to leverage industry-leading technology to ensure payroll accuracy, reporting, and efficiency

## Referral Payout on Close

\$10/FTE WSE with a \$1,000 Cap

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# Global Employment Services



## Overview

Vensure Global provides both international and domestic expansion solutions and HRIS technology to help companies scale faster, reduce risk, and eliminate operational complexity. Through global payroll, employer of record, contractor management, and global talent services, we set our clients up to operate around the world.

## Value Propositions

- › Deliver on-time, accurate payroll in local currencies.
- › Engage and pay global contractors efficiently and compliantly.
- › Access top global talent, no matter where they live, tailored to the business' needs.

**Referral Payout on Close**  
\$500 per Direct Client

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# Latin American Alliance



## Overview

Building a stronger America by focusing on Latino-owned businesses, Vensure Latin American Alliance creates unique opportunities to illuminate operational efficiencies, minimize the administrative burden, and significantly enhance employee benefit offerings.

**Referral Payout on Close**

Please See Core Services for Payout

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# Employer Solutions

Traditional Recruiting Services

High-Volume Recruiting

HR Only

Alternative Workforce Solutions (BPO)

VensureHR Staffing Alliance

Back Office Staffing

PrismHR Tax

Insurance Services

Vensure Benefit Offering

Master Major Medical Plans

Employee Benefits Consulting

Broker of Record (BOR)

Ancillary Offerings

Telehealth

Vensure Direct Care

Health Provider Pre-Qualifying Services

Retirement Planning

Time and Labor Management

Performance Management

Applicant Tracking

Employer Funding

Employee Screening

# Employer Solutions



## Overview

The Employer Solutions are a group of solutions made available to current Vensure and Vensure Division Partner clients as value-added offerings to protect them, help them grow, and improve overall employee culture, retention, and productivity. These solutions are specifically for our clients.

## Learn More About Vensure Marketplace

You can learn more about solutions available to our clients by visiting our marketplace online at [www.vensure.com/marketplace](http://www.vensure.com/marketplace).

**WELCOME TO**  
**VensureHR Marketplace**  
HR Solutions tailored for Small to Medium-Sized Businesses. With top-tier partners and cutting-edge technology, HR processes are streamlined to meet your needs. Say goodbye to obstacles and hello to success with strategic HR solutions. Thrive in every aspect of your business through top-notch services and innovative technology. Welcome to a new era of HR efficiency.

**Ready to get started?**  
**CONTACT US NOW!**

**Marketplace** **FILTER BY CATEGORY** Search...

 <b>Max Funding</b> <b>HEALTHCARE BENEFITS</b> Clearer Max Funding. Transform your employee benefits with flexibility and cost-effectiveness in healthcare... <b>LEARN MORE</b>	 <b>ClearCompany</b> <b>APPLICANT TRACKING SYSTEM</b> ClearCompany Applicant Tracking revolutionizes talent acquisition, helping businesses recruit faster and improve new hire success... <b>LEARN MORE</b>	 <b>Doctegrity</b> <b>TELEHEALTH</b> Doctegrity integrates with health benefits, offering employers cost-effective solutions and employees telehealth access... <b>LEARN MORE</b>
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# Traditional Recruiting Services



## Overview

Traditional recruiting is the classic model most business owners know — a professional team of recruiters handling the entire hiring process on their behalf. Vensure's recruiting team sources top talent (in all industries), screens candidates, and manages every step- from identifying best-in-class skills, to hiring the right people- so clients can stay focused on running their business. This service focuses on clients/prospects who want to hire 1-5 employees.

## Value Propositions

We offer this as a service to help clients:

- › Get higher-quality candidates.
- › Reduce hiring costs.
- › Lower turnover.
- › Grow their businesses.
- › Eliminate the work and complexity of recruiting by having our experts manage the full process.

**Referral Payout on Close**  
5% of Commissionable Revenue

# High-Volume Recruiting

Powered by HireFinder



## Overview

High-Volume Recruiting is our scalable model designed for clients who need to hire fast — whether it's for projects, seasonal spikes, or mass-hiring needs. Through our proprietary resource, HireFinder, our team sources, screens, and engages large pools of candidates efficiently so clients can fill roles quickly without sacrificing quality.

## Value Propositions

We help clients:

- › Source candidates through job boards, targeted emails, text campaigns, and live outreach.
- › Deliver only qualified, requirements-matched candidates— Both passive and active candidates.
- › Hire top talent with a cost-effective, professional recruiting approach.
- › Allow their business to grow at their pace.

**Referral Payout on Close**

**5% of Commissionable Revenue**

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## Overview

HRO is a Human Resources Outsourcing model for clients only needing or interested in HR support. We provide client HR consultation and work with them through the employee lifecycle, from recruiting to exit. We learn about our clients and their business objectives to create strategies that help them meet their goals. Whether we are examining compliance matters, company culture, learning and development, HR, or business trends, our representatives serve as partners to your business.

## Value Propositions

- › Multiple options and tools to address HR needs within your organization.
- › Dedicated HR professionals who can consult and guide on foundational, administrative, and strategic HR initiatives.
- › Support with federal, state, and local mandates.
- › Assistance with reshaping company culture, driving engagement, and improving performance.
- › Support with creating or organizing strategy for human capital alignment to business goals.

**Referral Payout on Close**

**\$50**

# Alternative Workforce Solutions

(also known as Business Process Outsourcing or BPO)



## Overview

Through our partner Solvo, Vensure's Alternative Workforce Solutions provide a client with employees based in Latin America. These, often bilingual, college graduates help our clients grow their workforce as an alternative to traditional recruiting processes that can be difficult to address in a timely and cost-effective manner. This is a great option for companies that are looking to fill positions that can work remotely.

## Value Propositions

- › New hires are often bilingual and have at least one college degree.
- › Hiring “nearshore” talent is much less expensive than traditional U.S.-based employees.
- › New hires are dedicated to the client company and are their employees, not a shared resource.
- › Employees can fit in or mirror any time zone requirements.

**Referral Payout on Close**  
**\$100 per Seat, \$1,000 per Client Max**

# VensureHR Staffing Alliance (VSA)



## Overview

VensureHR Staffing Alliance (VSA) guarantees a ready-to-run global staffing marketplace that gives business owners the resources, compliance support, and operational power they need to streamline their business and scale on their terms - whether optimizing for lifestyle, accelerating growth, or preparing for a successful exit. Clients will have access to a team of experts who understand the industry and its operations, while allowing them to focus on increasing revenue for their business.

## Value Propositions

- › Streamlined payroll, HR, hiring and onboarding processing.
- › Customized employee benefits and insurance products available.
- › ATS/ERP platforms are integrated to assist with payroll processing and make it more scalable.
- › Offers the ability for our VSA clients to expand or hire globally.

**Referral Payout on Close**

**Please See Core Services for Payout**

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# Back Office Staffing



## Overview

Sunset Cove Solutions is part of VSA and a division partner that provides a full suite of payroll and back office outsourcing solutions to the staffing industry. With over 70 years of staffing experience, they specialize in payroll, cash apps, invoicing, tax filing, 941s, and W-2 processing. With this solution, staffing clients can have peace of mind knowing that their back-office administration is being handled by experts!

## Value Propositions

- › Allows business to focus on their operations and clients.
- › Accurate and detailed reporting for clients.
- › Consolidated monthly statements and streamlined payroll processing.
- › Staffing client have the opportunity to gain valuable business insights through these solutions.

### Referral Payout on Close

\$50/FTE Worksite Employees with a \$4,000 Cap

# PrismHR Tax



PRISMHR  
Tax

## Overview

PrismHR Tax will provide complete tax software services for PrismHR clients. This solution complements our existing technology portfolio, which includes both PEO and HCM platforms, expanding capacity with a new tax module to serve our clients.

## Value Propositions

- › Ensure accurate calculations of federal, state and local taxes, reducing errors and penalties.
- › Monitor legislative changes and update tax forms accordingly, ensuring compliance.
- › Integrate with existing PrismHR platforms, reducing manual data entry and duplication of effort.

**Referral Payout on Close**  
**\$100**

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# Insurance Services



## Overview

Vensure can help our clients maneuver through all aspects of their insurance needs including required coverages, coverage reviews, annual renewals, coverage consolidation, risk assessment and planning, and most importantly, identifying and implementing the ideal and proper insurance coverages.

## Value Propositions

- › We offer dozens of policies including many that are not available direct to the customer.
- › We focus on risk assessment and planning to ensure that the ideal coverage is in place for our clients.

**Referral Payout on Close**

See Below for Insurance Sub-Categories

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# Cyber Liability Insurance



## Overview

Data protection and network security are quickly becoming critical risks to most types of businesses. Cyber Liability insurance is a specialty line insurance product intended to protect our clients from internet-based risks and risks related to IT infrastructure and information privacy.

## Value Propositions

Cybersecurity insurance can protect businesses through the following coverages:

- › Incident Response and Forensic Fees
- › Business Interruption
- › Data Recovery
- › Cyber Extortion
- › Reputational Damage
- › Credit Monitoring
- › Regulatory Defense & Penalties
- › Legal Defense

**Referral Payout on Close**  
**\$25 Vensure Swag Credit**

# Insurance Services

Continued

## **Workers' Compensation**

Workers' compensation insurance helps protect businesses and their employees from financial loss when an employee is hurt on the job or gets sick from a work-related cause.

## **Employment Practices Liability Insurance (EPLI)**

EPLI stands for employment practices liability insurance and is specialized insurance designed to protect clients against losses that can come from litigation and wrongful employment practices claims.

## **General Liability**

General liability insurance is a broad type of insurance policy that provides liability coverage for general business risks like bodily injury or property damage on the business premises or due to business operations.

## **Commercial Auto**

Commercial auto covers a "commercial vehicle," used or maintained for the transportation of persons for hire, compensation, or profit primarily for the transportation of property (for example, trucks and pickups).

# Vensure Benefit Offerings



Vensure offers multiple options for benefits that could be a fit for any client! Here are the major benefit groupings:

## Master Medical Plans

- › Provides access to all major carriers and plans.
- › Clients get assistance for plan selection each year during open enrollment.

## Brokerage/Open Market Plans

- › Provides competitive options for medical plans for our clients.
- › Over 100 carriers to work with!

## Ancillary Benefits

- › Additional benefit options that our clients can take advantage of!
- › **Options can Included:**
  - › Telehealth
  - › Dental
  - › Vision
  - › Life Insurance and more!

# Master Major Medical Plans



## Overview

Vensure offers a full suite of master major medical benefits with a growing group of large insurance carriers across the nation. Our clients have access to benefits that are flexible, cost effective, and more!

## Value Propositions

- › Clients have a team at Vensure that will assist them each year during health insurance plan selection and enrollment.
- › A variety of carrier options give our clients the best chance to provide a great plan to their employees at competitive rates.
- › Provides a great option for benefits that leads to support in recruiting and retention.

**Referral Payout on Close**  
**\$500**

# Employee Benefits Consulting

## Brokerage Services



### Overview

PEO or Payroll/HCM clients may be better positioned to have competitive benefits from open market plans. Clients can outgrow a Master plan often resulting in Vensure or a related Division losing a client to outside brokers. The brokerage serves a key role in helping Vensure or related Divisions to retain the client on PEO or Payroll/HCM. The goal is to educate the client on many additional options to finance healthcare and provide affordable solutions to clients that are available in-house and on the market today. No need for counsel from an outside broker.

### Value Propositions

- › Thompson Risk educates employers how to leverage direct to provider solutions that bring providers direct to the employer, resulting in driving down costs while also helping employees obtain services directly.
- › The Thompson Risk team is nationwide, licensed in all 50 states, appointed with over 100 carriers and currently providing comprehensive major medical to over 250,000 lives in the US. The combined leverage at scale offers world class options for clients to explore that they could not get on their own. The brokerage even has created it's own proprietary programs you cannot obtain elsewhere.

**Referral Payout on Close**  
**\$100**

# Broker of Record (BOR)



## Overview

Our in-house brokerage delivers a strategic, streamlined, and cost-effective approach to managing all your employee benefit needs. This BOR option will help clients deliver better benefits, save time, and control costs.

## Value Propositions

- › Our clients get a single, trusted team that understand their business.
- › We leverage market relationships to ensure competitive rates are secured.
- › We reduce complexity with centralized management, compliance support, and seamless coordination across all benefit programs.
- › We assist our clients with staying ahead of regulatory changes and industry trends with expert insights and ongoing support.

**Referral Payout on Close**

**\$100**

# Ancillary Offerings



## Supplemental Plans

Through several different carriers, Vensure offers the following for individuals and families:

- › Dental
- › Vision
- › Life Insurance
- › Short Term Disability
- › Long Term Disability

## Voluntary Plans

Through different carriers, Vensure offers the following voluntary plans:

- › Accident Insurance
- › Cancer Insurance
- › Hospital Indemnity
- › Critical Illness Insurance

**Referral Payout on Close**  
**\$100**

# Telehealth



## Overview

With telehealth services, an employee can visit a doctor virtually 24/7/365 from home, the office, or on the go. Common treatments by telehealth are allergies, cold and flu symptoms, COVID-19 concerns, ear and throat infections, respiratory problems, and much more.

## Value Propositions

- › Vensure's partners provide board-certified doctors.
- › Service is available anytime, day or night, and available by mobile app, video, or phone.
- › Telehealth can be used for prescription refills and can be sent to the nearest pharmacy if medically necessary.
- › \$0 copay and deductible.

**Referral Payout on Close**

**\$50**

# Vensure Direct Care



## Overview

Vensure clients are always looking for more ways to enhance their current benefits offerings. Many employers in today's market are looking for options to connect their employees direct to provider. Vensure Direct Care is a program that brings world class providers to our clients in a variety of ways.

## Value Propositions

- › **Direct Primary Care (DPC):** Vensure connects employees to affordable primary care via a private network of subscription-based DPC Doctors.
- › **Specialists:** Vensure has created access for clients to obtain Specialists same day with a four hour diagnosis in many specialties, cutting through long waits common in todays crowded insurance world.
- › **Direct Care Marketplace:** Vensure enables individuals and businesses to work directly with Urgent Care providers through SaaS-based membership process.
- › **Mental/Behavioral Health:** Vensure has options to assist clients in direct contracts with Mental or Behavioral Health care providers through various solutions providers.

**Referral Payout on Close**

**\$50**

# Health Provider Pre-Qualifying Services

Powered by AIMM



## Overview

AIMM is a team of nurses and doctors who help people navigate two complex ecosystems: the health care delivery system and the health plan/insurance system. Ensuring that the right patients are getting the right care at the right time in the right place helps ensure the right price. Helping patients access objective data about the gold standard of clinical care, the highest quality providers and facilities, and what costs to expect (and how to mitigate them) brings both peace of mind and unparalleled support to people experiencing any health issue.

## Value Propositions

- › Being sick can be scary—this resource and support helps alleviate that fear.
- › Improves the quality of care that people receive.
- › Helps people to be better able to afford the care they need.
- › Helps people overcome any barriers that they encounter.
- › Helps people navigate complex and cumbersome systems more easily.

**Referral Payout on Close**

**\$50**

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# Retirement Planning

Powered by PrismHR Retirement Services



## Overview

Our clients do not have to look outside of Vensure to secure a valuable retirement plan. Employees often rate a 401(k) among the top three most valued employer benefits, and we offer plan options that meet state requirements, qualify for new plan tax credits and help attract and retain top talent. The first step is to find out if the client currently offers a plan outside of Vensure

## Value Propositions

- › The 401(k) PEP plan is one of the lowest cost 401(k) options available.
- › Through this plan, our clients will have a dedicated 401(k) advisor assigned to their plan to help with any questions or concerns they may have.
- › The 401(k) PEP plan is 100% integrated and connected to the client's payroll, no matter the platform.
- › A key driver for companies to set up and offer a plan are the tax deductions owners can get when they make contributions to their own plan.

**Referral Payout on Close**

**\$225**

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# Time and Labor Management

Powered by PrismHR Workforce Management



## Overview

Time and labor management systems help our clients manage overtime, absences, overstaffing, and understaffing through effective and efficient ways to track and collect hours worked by employees.

## Value Propositions

- › Improves clock-in via web or mobile device.
- › Eliminates buddy-punching or unauthorized clock-ins through geofencing.
- › Employees can view and print schedules, request time off, and clock in/out.
- › Aligns staffing needs with budget, demands, and requirements.
- › Manages PTO by auto-calculating time off and related leave time.

**Referral Payout on Close**

**\$100**

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# Performance Management

Powered by Agile - PrismHR Talent Management



## Overview

Vensure offers performance management software that can help clients establish goals, track progress, and assess results. Our performance management offering includes tracking manager and employee appraisals, team and employee goal setting, automatic performance review completion reminders, and assistance in developing and retaining top talent.

## Value Propositions

- › Flexible configuration supports a variety of review formats.
- › Automated reminders help ensure timely review completion.
- › Status dashboard provides an overview of milestone achievements and overdue appraisals.
- › Comprehensive template library includes job competencies and suggested objectives.
- › Helpful coaching resources available for managers.

**Referral Payout on Close**

**\$100**

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# Applicant Tracking

Powered by Agile - PrismHR Talent Management



## Overview

An applicant tracking system is software that enables the electronic handling of recruitment, hiring, and onboarding needs. This system allows for a newfound ease of finding, handling, and hiring qualified candidates.

## Value Propositions

- › Customizable portal that automatically posts jobs to top social and recruiter sites, tracks candidate engagement, and incorporates changes in real time.
- › Scores and ranks candidates using your own criteria.
- › Establishes automated email triggers for candidates and hiring managers. It can also use SMS/Text capabilities to answer questions and schedule interviews.
- › Generates offer letters for candidates to electronically sign and submit.

**Referral Payout on Close**

**\$100**

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# Additional Employer Solutions

## **Employer Funding Solutions (\$50 referral payout)**

Vensure clients have access to money to help them meet payroll deadlines or acquire working capital. Invoice financing, also known as invoice factoring or accounts receivable financing, is the process of selling a business's invoices for immediate access to cash.

## **Employment Screening (\$50 referral payout)**

Employment screening helps businesses confirm their new or prospective hires are the right fit for the job. Types of screening include background checks, substance testing, and background investigations into applicants' personal lives via social media.

# **Additional Solutions**

**Identity Theft**  
**Employee Earned Wage Access**  
**Pet Insurance**  
**Personal Insurance Lines**  
**Legal Services**  
**Debit/Pay Cards**  
**Employee Perks**  
**Car Rental Discounts**  
**Roadside Assistance**  
**Work Opportunity Tax Credit**  
**HR Compliance**  
**Payment Processing**  
**Benefits Administration Tool**  
**Tax Filing**

# Additional Solutions



## Overview

These solutions offered through Vensure are made available to the employees of current Vensure and Vensure Division Partner clients as value-added offerings to enhance their employment experience, receive discounts, and make their lives easier. These solutions are specifically for the employees of our clients and current internal Vensure employees.

## Identity Theft

Vensure client employees can access identity protection services that can protect individuals and families if personal and private information is compromised, and assist in the recovery process.

## Employee Earned Wage Access

Vensure client employees can access wages they have earned before payday. When an employee has the need for income and cannot wait until payday, this solution allows them to have immediate access to earned wages with real-time payments.

## Pet Insurance

Pet insurance is health insurance for your pet. Vensure offers plans that cover through reimbursement the costs of treating unexpected injuries, illnesses, and veterinary expenses.

# Additional Solutions

## Personal Insurance Lines

Vensure offers coverage in several personal insurance-line areas including homeowners, auto, renters, boat, recreational vehicle, personal property, and personal excess liability.

## Legal Services

Vensure offers legal plans for individuals and families for expert advice in legal matters including buying or selling a home, getting married, caring for elderly parents, and creating a will.

## Debit/Pay Cards

Through Vensure's partners, an employee can have their payroll wages deposited directly into a paycard or debit card account. The money can easily be accessed by using checks or debit/credit card.

## Employee Perks

These perks include private discounts and corporate rates on movie tickets, oil changes, car rentals, hotels, and more. There are thousands of discounts to be taken advantage of across more than 1 million redemption locations.

## Car Rental Discounts

Vensure offers an exclusive discount program to receive the best car rental rates.

# Additional Solutions

## Roadside Assistance

With 24/7 coverage nationwide, our clients can benefit from roadside assistance. This solution provides real-time tracking, instant dispatch, and access to service across the country. Clients can have peace of mind knowing that we can help get them back on track anytime and anywhere! This assistance can cover anything from emergency towing and flat tire service, to fluid delivery and lockout assistance.

## Work Opportunity Tax Credit

Work Opportunity Tax Credit (WOTC) is a federal tax credit available to private-sector businesses, rewarding them for every new hire that meets eligibility requirements. The government program has identified nine target groups that have historically faced significant barriers to employment and offers participating companies between \$2,400 – \$9,600 per new qualifying hire.

## HR Compliance

Navigating the ever-evolving landscape of local, state, federal, and international regulations has become increasingly complex for today's employers. Falling short of compliance can result in costly consequences. VensureHR simplifies this challenge. Our AI-powered compliance platform delivers real-time legal insights, automated alerts, and intelligent tools designed to support confident, and compliant decisions that can reduce risk and ease the burden of regulatory management.

# Additional Solutions

## Payment Processing

Simple and secure payment processing solutions for clients, that caters to businesses of all sizes. You can unlock a package of exclusive membership perks at no additional cost, with your payment processing purchase. Attract and retain employees, while offering the best to your clients!

## Benefits Administration Tool

Optimize and enhance your employee's benefit enrollment experience with AI tools. Our AI-driven Plan Comparison Tool aids employees in choosing the best available medical plan for their needs and budget as they go through the open enrollment process. Then, post-enrollment, the tool helps employees leverage their elected benefits by assisting with finding top doctors in the network, estimating the cost of care, booking appointments, and much more!

## Tax Filing

Combine expert filing pros and technology to make taxes easier. Filing that is done completely electronic, but with Tax Pros that will help you maximize eligible deductions and file accurately.

*\*Disclaimer: Not all solutions are eligible for a referral payout or a spot on the Bonus Board.*

# **Our Core Business Units and Valued Partners**

Vensure Core Business Units  
Division Partners

# Core Business & Valued Partners



## Vensure Core Business Units

Through our core business units, Vensure delivers a wide range of services to help companies manage teams of all sizes with cutting-edge technology, payroll administration, workers' compensation, healthcare and retirement benefits, and nearshore hiring.

## Division Partners

Vensure's Division Partners have joined with Vensure to accelerate growth, profitability, technology, and service offerings. Division Partners operate in the payroll and human resources industry and provide PEO, HCM, and/or additional core services including payroll, HR, employee benefits, safety and risk, and workers' compensation.

# Core Business Units



VensureHR was founded in 2004. VensureHR is a PEO specializing in payroll, medical and voluntary benefits, workers' compensation, risk management, and human resource administration, supporting a wide range of industries.



Solvo is changing how North American companies connect with talented, nearshore employees. Solvo provides exceptional, affordable remote talent to U.S. and Canadian businesses in 50+ industry specialties. Clients benefit from employees with no language barriers, a strong work ethic and who are in the same time zone, mirroring clients' office environment with full oversight and transparency.



PrismHR provides a platform for their customers that allows them to manage payroll, benefits, compliance, and HR all with a single technology partner. This platform is flexible, which allows them to serve customers with different needs and allow them to scale as they grow.

# Division Partners



Headquarters: Arkansas

January 22, 2016

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Headquarters: Florida

August 21, 2017

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Headquarters: Florida

September 30, 2017

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Headquarters: Georgia

December 31, 2017

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Headquarters: Hawaii

December 31, 2017

# Division Partners

**worklogic**HR



Headquarters: California

January 31, 2018

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**Harbor**America



Headquarters: Texas

January 31, 2018

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**worklogic**EPS



Headquarters: California

February 28, 2018

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**Employee**Max



Headquarters: Pennsylvania

April 30, 2018

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**National**peo



Headquarters: Arizona

August 31, 2018

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# Division Partners

HUMAN CAPITAL



Headquarters: Michigan

September 30, 2018

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ALLIANCE™  ALPINE BENEFITS



Headquarters: Utah

October 31, 2018

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 QBS



Headquarters: South Carolina

February 28, 2019

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 agile | HR



Headquarters: Massachusetts

April 1, 2019

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 AccessPoint



Headquarters: Michigan

April 30, 2019

# Division Partners



Headquarters: Florida

July 31, 2019

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Headquarters: West Virginia

August 31, 2019

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Headquarters: Mexico

October 31, 2019

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Headquarters: California

October 31, 2019

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Headquarters: California

October 31, 2019

# Division Partners



Headquarters: Michigan



December 31, 2019

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Headquarters: California



December 31, 2019

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Headquarters: Idaho



January 31, 2020

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Headquarters: Florida



January 31, 2020

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Headquarters: Ohio



January 31, 2020

# Division Partners



Headquarters: Montana

March 31, 2020

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Headquarters: Canada

July 31, 2020

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Headquarters: Illinois

November 20, 2020

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Headquarters: Texas

March 31, 2021

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Headquarters: Ohio

March 31, 2021

# Division Partners



Headquarters: Illinois

July 30, 2021

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Headquarters: Ohio

August 13, 2021

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Quickpay Payroll



Headquarters: Florida

October 31, 2021

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Headquarters: California

December 31, 2021

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Headquarters: Nebraska

December 31, 2021

# Division Partners



Headquarters: Florida

December 31, 2021

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Headquarters: Massachusetts

December 31, 2021

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Headquarters: Florida

December 31, 2021

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Headquarters: Texas

March 31, 2022

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Headquarters: Florida

March 31, 2022

# Division Partners



Headquarters: Georgia

April 30, 2022



Headquarters: Wisconsin

May 31, 2022



Headquarters: Florida

June 30, 2022



Headquarters: Canada

June 30, 2022



Headquarters: Texas

August 31, 2022



# Division Partners



Headquarters: New York

September 1, 2022

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Headquarters: New York

September 30, 2022

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Headquarters: California

September 30, 2022

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Headquarters: Canada

February 28, 2023

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Headquarters: Utah

April 30, 2023

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# Division Partners



Headquarters: Massachusetts

April 30, 2023

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Headquarters: Massachusetts

April 30, 2023

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Headquarters: Ohio

November 30, 2023

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Headquarters: Colombia

March 31, 2024

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Headquarters: California

April 30, 2024

# Division Partners



Headquarters: Texas

April 30, 2024

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Headquarters: Argentina

April 30, 2024

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Headquarters: Illinois

July 30, 2024

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Headquarters: Massachusetts

June 30, 2024

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Headquarters: Florida

August 31, 2024

# Division Partners



Headquarters: New York

September 30, 2024

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Headquarters: Israel

September 30, 2024

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Headquarters: Washington, D.C.

February 28, 2025

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Headquarters: New York

February 28, 2025

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Headquarters: Utah

February 28, 2025

# Division Partners



Headquarters: Michigan

March 31, 2025

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Headquarters: Indiana

April 30, 2025

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Headquarters: New Mexico

May 31, 2025

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Headquarters: California

May 31, 2025

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Headquarters: Nevada

August 31, 2025

# Division Partners



Headquarters: Colorado

August 31, 2025

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Headquarters: Utah

September 30, 2025

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Headquarters: Mexico

October 31, 2025

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Headquarters: Georgia

November 30, 2025

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Headquarters: Michigan

November 30, 2025

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# Division Partners



Headquarters: Georgia

December 31, 2025

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Headquarters: California

March 31, 2026

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Headquarters: Washington

March 31, 2026





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Version 2026-Q1

**Vensure**ENGAGE  
Elevate / Educate / Empower