

Payroll and HR Service for Family Office Clients with Private Staff

TEAM fully offloads the administrative burdens from advisors and client teams while providing enhanced benefits for employees and white-glove service for clients

1. TEAM becomes the W-2 Employer of staff

Payroll and administration

- Collecting timecards
- Processing payroll
- Background checks
- Keeping records
- Filing taxes

Compliance and liability

- Employment law compliance (e.g., sick leave, minimum wage)
- Robust liability protection

Expert HR support

- Unlimited access to in-house HR
- Consultation, coaching, and guidance
- Employee relations management and terminations

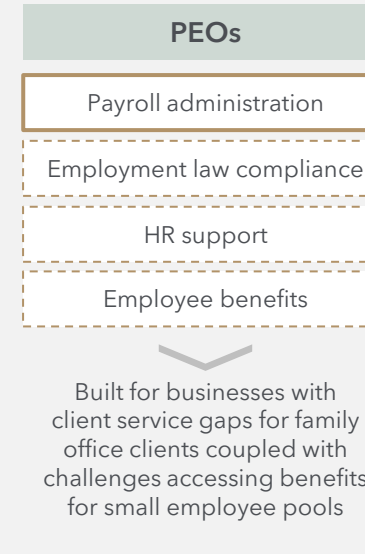


Employee benefits

- Group-sponsored medical, dental, and vision insurance
- Retirement options
- Customizable benefits (e.g., stipends, bonuses)

Services

2. Unlike alternatives, TEAM specializes in domestic employment



3. Typical client profiles where TEAM is a strong fit



SINGLE-EMPLOYEE HOUSEHOLDS new to payroll or running through an existing entity



MULTI-EMPLOYEE HOUSEHOLDS using advisors to procure insurance and benefits and run payroll



MULTI-EMPLOYEE HOUSEHOLDS using their operating business to run payroll



PUSH TO UP-LEVEL STAFF EXPERIENCE through formalized HR and enhanced benefits



MULTI-GENERATIONAL OR GROWING STAFF driving more complex, varied setups and increased risk profiles



FOUNDATIONS that are resource-constrained and looking for support

4. TEAM pricing model

COST OF BEING AN EMPLOYER:

Gross wages

Workplace insurance
(~5 to 18% of gross wages)

Employer taxes

TEAM ADMIN FEE:

\$215 per employee per month

5. Key stats

450+
financial institutions served

9.8/10
average client satisfaction

99.98%
payroll processing accuracy