

# SEE HOW A NEW PEO WINS THE SHOW

the good

Summit Identified and remedied tax failures within one PEO, then transitioned to a new PEO.

*Inception Year: 2021*

*Stage of Partnership at time of Win: Special Projects*

- Client received multiple late fees and notices for unfiled and unpaid taxes, a service the PEO was supposed to be managing.
- Summit did a thorough review and clean-up of outstanding tax items and identified the misses from the PEO.
- Summit led the resolution process with the PEO to have the fines and fees repaid for the point of failure and worked to make it right for the client. The PEO was inflexible with a long-term resolution and agreement to keep things right and avoid future errors.

**Industry:** Consulting

**No. of Employees:** 1-10

**PY Annual Revenue:** \$1.8M

**Client Pays:** \$104,052

**Service:** Virtual CFO

- CFO with Tax - Simple Financial Statement
- Payroll Administration
- Expense Tracking
- Cash Flow
- Bank Reconciliation
- Credit Card Reconciliation
- Accounts Payable
- Accounts Receivable
- Property Tax
- 1099 Taxes



**Jon MacDonald**  
President, Founder

“ One of the things I appreciate the most about Summit was a smooth, seamless onboarding experience. The way the team steps in to help and support us migrate through services and processes has been huge. When one platform was no longer a good fit for us, Summit helped us transition to a new one.”

- Summit connected the client with a new PEO and led the implementation for a quick turnaround and transition. Summit continued to work through the resolution of outstanding tax items with the outgoing PEO.

## BENEFITS TO THE IMPLEMENTATION/SOLUTION

Client has successfully migrated all employee and benefits data to the new PEO, with Summit processing the first payroll without snags.