



FINANCIAL SERVICES



HR that delivers a Higher Return

Meet challenges head-on with an HR solution that puts you and your people at the center. Count on our premium service model with a single point of contact and a dedicated service team that knows financial services so you can stay focused on your investments. With high-touch services, top-tier benefits and direct access to HR best practices, you and your team gain more time to focus on growing your business.



Do More in Less Time

With payroll processing, benefits and HR administration on one single platform, you spend less time on HR. Get support across an entire employee lifecycle—from recruiting and onboarding to performance management. We'll even handle off-cycle bonus payments and K-1 distributions for partners and members.



Attract Top Performers and Stand Out from Other Firms

Recruit skilled talent and stay competitive by providing big company benefits and premium level services. From onboarding new hires to benefits enrollment, our HR support delivers a great experience for your team.



Stay Protected and on Top of Compliance

Not enough hours in your day to spend on complex HR regulations and employment issues? Rely on our expertise in HR compliance in all 50 states. Safeguard against common employment-related lawsuits with an EPLI policy.



62% Financial services executives feel the heat to deliver business results under shorter timelines. Without the right people and skills, it's tough to meet these demands.¹

78% of workers said they would likely remain with their employer because of the benefits it offers.²

¹PwC 21st CEO Survey 2018 at www.pwc.com/gx/en/ceo-survey/2018/deep-dives/ceo-survey-financial-services-talent-report-web.pdf.

²Willis Towers Watson 2018 Employer/Employee Satisfaction Survey at www.willistowerswatson.com/en-US/insights/2018/08/employee-and-employer-satisfaction-with-group-benefit-marketplaces-survey-results

INCREDIBLE STARTS HERE.

ACCESS TO BENEFIT OPTIONS

Promote a total compensation package:

- A variety of top-tier health, dental and vision plans from leading carriers
- Flexible spending accounts (FSAs) for health and dependent care
- Life and AD&D insurance and short- and long-term disability plans
- Executive disability plans
- 401(k) retirement plan, with options for employer matching, profit sharing and safe harbor
- Employee assistance program (EAP) and voluntary benefits and services
- Pre-tax commuter benefits, employee perks and discounts, pet insurance and COBRA administration

HR EXPERTISE

Count on an experienced HR team to help solve your HR concerns:

- **Human Capital Associates:** A primary point of contact for service matters and ongoing follow up
- **Human Capital Business Partners:** A direct resource for best practices guidance on important HR matters such as handbooks, employment law compliance, hiring and terminations
- **Account Managers:** Executive level engagement, identifying opportunities for strategic alignment to your business objectives

PAYROLL SERVICES

Gain support in key areas:

- Payroll processing, tax filing and reporting
- K-1 distributions for partners and members
- Off-cycle and bonus payments
- New hire orientation for payroll and benefits
- Direct deposit, time off tracking and reporting

RISK MITIGATION

Get access to resources and services:

- Best practice guidance for risk prevention
- Support with federal and state employment laws
- Online reference library and resources for employee handbook development
- Sexual harassment awareness training
- Employment practices liability insurance (EPLI)
- Pre-negotiated fees for legal counsel
- Claims management support
- I-9 documentation
- Unemployment administration and reporting
- EEO-1 administration and filing
- State-required notices and poster audit

TECHNOLOGY PLATFORM

Find your HR tools all in one spot:

- Online self-service, analytics and reporting tools for both managers and employees
- Integrated and managed enterprise-level platform
- Performance management to track goals and streamline the review process
- Expense management automates the entire expense reimbursement and reporting process
- Applicant tracking simplifies the hiring process, including job postings and candidate boards
- Time & Attendance management simplifies scheduling, tracking, and more—all integrated with payroll
- A mobile app for quick access to the essentials
- Document employee reviews with TriNet Perform
- TriNet Mobile—an app giving employees quick access to HR essentials

Learn all about our tailored solutions for financial services firms at [TriNet.com](https://www.trinet.com) or call **888.874.6388**.

