

## EMPLOYER OF RECORD SERVICES FOR YOUR WEALTH MANAGEMENT CLIENTS

Do your clients make regular payments to individuals for household services or do you coordinate payments on their behalf?

**TEAM can help.**

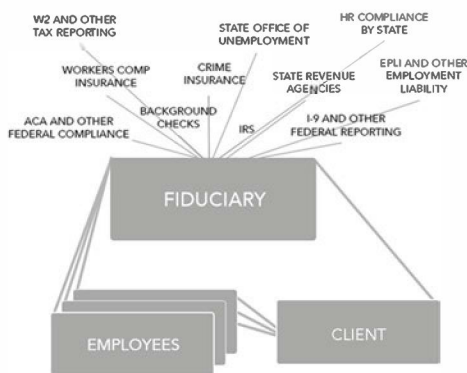
### What We Do

TEAM eliminates both the **administrative burden** and the **employment liability** which results from employing people on behalf of a family, trust, estate, or any other entity.

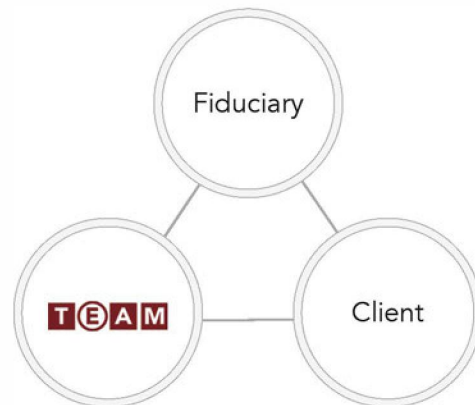
Employment liability is one of the few liabilities which can pierce the veil of even the most well-managed estates, putting your clients' assets at risk. Partnering with TEAM adds a valuable service to your offering and allows you to more proactively manage risk for your clients and your organization.

As the employer of record, TEAM provides a seamless solution to household employment challenges by eliminating the hassles of employee administration and protecting the trust from employment-related risk.

### Without TEAM...



### With TEAM...





TEAM is a national leader in the outsourced household employment market. We provide payroll, human resources, and risk management through our employer of record services to wealth managers and fiduciaries nationwide, offering:

**Flexible, accurate, and reliable payroll processing:**

We process payroll in-house which means we're fast and responsive.

- We provide payroll processing, W-2s, and wage reports for court audits.
- We offer multiple pay frequencies and can process payroll on any day of the week.
- We ensure proper withholding and payment of federal, state, and local taxes.

**Full suite of HR services:** Your clients choose the employees they want to work with. We perform the necessary reviews and manage employee issues.

- We manage all hiring and termination paperwork.
- We perform background checks and E-Verify.
- Our bilingual staff is on-call to assist employees with any issues that arise.
- We ensure compliance with federal, state, and local employment law.

**Liability protection:** As the employer of record, TEAM puts in place internal and external risk management procedures, supported by a robust array of insurance policies designed to protect all parties.

- We maintain a national workers' compensation policy and a full complement of general and professional liability insurances.
- We offer group health insurance to full-time, benefits-eligible employees.
- We indemnify our clients against any employment-related claims.

**Great customer service:** We work hand-in-hand with you, your clients, and employees to ensure a seamless experience.

- You will have a single point of contact dedicated to your account.
- We provide direct access by phone or email.
- We have over a decade of experience providing white-glove service to meet a wide range of client needs.

Established in 2003, we are now proud to serve a majority of the largest banks in the US

**92%** of our clients rated us a 9 or 10 out of 10 on our annual client satisfaction survey

OUR CLIENTS INCLUDE:



Northern Trust

CITY NATIONAL BANK



**QUOTES FROM A FEW OF OUR CLIENTS:**

"The staff at TEAM consistently provides **outstanding service** that is efficient, professional, and most importantly client-centric."

"TEAM has been an **excellent partner on all fronts** - helping our clients, managing risk, communication, responsiveness.....you name it!"

"TEAM provides excellent service and **valuable knowledge in navigating complex situations.**"

"The service TEAM provides is **invaluable**. The staff is extremely professional and efficient. It is truly a pleasure to work all of them."

TEAM Risk Management Strategies, LLC

TELEPHONE 619.281.1100 | FAX 619.281.1926 | [www.teamemployer.com](http://www.teamemployer.com)