# PLANPAYROLL™

Free quote:

401kpricing.com/costco

More info:

866·817·1719 x1

The ShareBuilder PLANPAYROLL frees you from the hassle of calculating payroll taxes, filling out payroll forms, keeping track of deadlines, and complying with ever-changing tax rates. With PLANPAYROLL, every payday can be fast, easy and error-free.

## Full service solution

- Input data and view reports via secure web-based access.
- PLANPAYROLL includes direct deposit, W-2s, W-3s, and new-hire reporting at no extra cost.
- Access check stubs, accruals, and multi-year W-2s from employee and manager accounts.

## Processing is a snap

- PLANPAYROLL is fully integrated with ShareBuilder's 401k and will save you valuable time.
- You can process your complete payroll in minutes.
- PLANPAYROLL includes a tax filing and payment feature that helps ensure your business stays in compliance with the IRS as well as state and local authorities.

## More affordable than you think

- You can save 30–50% off what you are accustomed to paying.
- Simple monthly pricing, no matter how many times you run payroll.

## Affordable pricing

Monthly admin fee:

**$40–$42.50**

Monthly employee fee:

**$3–$4**

## Making it easy

Payroll processing

Secure online access

Integrated with your ShareBuilder 401k

Employee access to input hours

Tax payment and filing

© 2010 ShareBuilder Corporation. ShareBuilder is a registered trademark of ShareBuilder Corporation. ShareBuilder 401(k) is offered through ShareBuilder Advisors, LLC, a registered investment advisor and a subsidiary of ING Bank, fsb, that is not affiliated with Costco. By opening an account, you will become a customer of ShareBuilder Advisors LLC. Costco is not an advisor or broker and is not facilitating your 401(k) plan or portfolio selections. Costco will have no involvement in any account you establish with ShareBuilder. Costco is not responsible or liable, directly or indirectly, for any information provided by ShareBuilder or for any damage or loss arising out of or in connection with ShareBuilder Advisors or the 401(k) program. **401(k) plans are: Not FDIC insured · Not bank guaranteed · May lose value**

# Q&A

Q: **How does the process work?**

A: It's quite simple. Enter the payroll information once at our secure Web site. Tax and other deductions are calculated, and deposits are automatically made for you. From then on, completing each payroll is no more than a few clicks away. Employees are paid by direct deposit and receive email notifications to go to a password-protected web site to view their pay stub.

Q: **What documentation is needed to process payroll?**

A: Federal regulations require that we receive complete and signed documentation before we can begin processing payroll. Required documents include: 1) Payroll Services Agreement; 2) Reporting Agent Authorization; 3) State Power of Attorney (needs to be notarized); 4) Proof of Prior Balances (or most recent QTD/YTD reports). Additionally, we request that you provide the following information shortly after being set up as a customer: 1) Copies of quarterly and annual returns; 2) Tax deposit coupons; 3) Copies of state registrations; 4) SUI Rate-Change Notice. These documents will help facilitate future tax filings and payments.

Q: **Will PLANPAYROLL process payroll tax filings for a previous quarter or year?**

A: We will only process payroll tax filings for the periods in which our services were used. Since we file and pay taxes on a current basis, there will never be a need for us to file or pay taxes for a previous quarter or year.

Q: **Can I track employees' hours or salaries to different departments?**

A: Yes, we can handle a range of job classification levels that allow you to report payroll information for different departments and divisions. This enables you to get a handle on labor expense allocations.

Q: **Can completed payroll data be directly exported into Excel/Quicken/Quickbooks?**

A: Yes, you have the ability to download summary-level payroll data for use in QuickBooks and other applications. At this time, payroll data can be exported as a text file and imported into most applications.

Q: **Will PLANPAYROLL help me track and accrue vacation, sick, and/or personal days?**

A: Yes, you will be able to adjust the rate at which each employee earns paid time off such as vacation, sick, and personal time. You also have the ability to set a maximum number of accrued days per employee.

Q: **Can I run payroll for employees outside of the United States?**

A: Currently, PLANPAYROLL can only process payroll for employees in the United States. We do not adhere to foreign tax tables that would enable us to process payroll in other countries.

Q: **Do you handle my taxes?**

A: We automatically calculate, deduct, pay, and file all taxes including federal, state, and local. Once you enter the payroll data, we'll handle the tax calculations, deductions, and filings. We then deposit them into the appropriate government accounts. It's that simple.

Q: **Do I need extra software or equipment?**

A: No. All you need is a web browser and an Internet connection, and you are in business. That's it! There is no software to install, upgrade, or maintain.

PLANPAYROLL is a trademark of PAi and this service mark has been licensed for use by ShareBuilder.

This information does not constitute tax advice. Please consult your tax adviser for specific tax information.

**866·817·1719 x1**

**401kpricing.com/costco**