



Our business is growing yours





# About CBIZ

*National Resources; Personal Service*



#1 Largest U.S. Benefits Specialist

A Top 20 Largest Broker of U.S. Business

9th Largest Accounting Provider Nationally\*

A Top 100 Retirement Plan Adviser

NYSE: CBZ



\*All audit and assurance services are provided by Mayer Hoffman McCann P.C., an independent CPA Firm



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**AMERICA'S BEST**  
**EMPLOYERS**

POWERED BY STATISTA

America's #1  
Consulting &  
Accounting  
Employer

With offices in major metropolitan areas and suburban cities across the nation, CBIZ helps businesses grow and succeed by helping them better manage their finances, their risk and their employees.



100+ | offices  
4,000+ | professionals  
90,000+ | clients



# Multiple Services with a Single Focus: Your Success

## Growth and Success. Efficiency and Profitability.

It's likely these goals are top priorities for your business. It's also likely that the daily distractions of financial and employee issues diminish your ability to focus on those goals.

CBIZ enables you to dedicate your time to critical business matters by providing custom solutions that help you manage your finances, risk and employees.

We offer clients exceptional quality and diverse capabilities with the personal attention your business needs and deserves, all with a single focus: your success.



**BENEFITS &  
INSURANCE**

**CLIENT**

**FINANCIAL &  
ACCOUNTING**

### Benefits & Insurance

- Employee Benefits Consulting
- Human Capital Management/Payroll
- Property & Casualty
- Retirement Plan Services
- Human Capital Services
- Executive Search
- Compensation Consulting
- Life Insurance

### Financial & Accounting

- Accounting & Tax
- Government Health Care Consulting
- Financial Advisory
- Valuation
- Litigation Support
- Risk & Advisory Services
- Real Estate Advisory Services



# Financial & Accounting Services

With today's complex business challenges, you need more than a service provider. You need a partner who looks at the whole picture in order to provide the solutions you need to accomplish your business goals. Our professionals value client interaction and strive to build a relationship as your trusted business adviser. At CBIZ, we have the expertise, resources and business acumen necessary to deliver the services and solutions that will give you that extra competitive edge.

## TAX COMPLIANCE

- Tax Return Preparation for:
  - Businesses
  - Estates & Trusts
  - Not-for-Profit Organizations
  - Employee Benefit Plans
  - High Net Worth Individuals
- IRS & State Audit Representation
- Accounting for Income Taxes

## TAX CONSULTING

- Entity Selection
- Estate, Gift & Trust Planning
- Retirement Planning
- Federal & State Credits & Incentives
- International Taxation
- Transfer Pricing
- State & Local Taxation
- M&A Transaction Structuring

## FINANCIAL ADVISORY

- CFO & Accounting Outsourcing
- Family Office Services
- Succession Planning
- Credit Risk Advisory Services
- Due Diligence

## FORENSIC & FINANCIAL SERVICES

- Corporate Recovery, Bankruptcy Services & Creditors' Rights
- Family Law
- Forensics & Investigative Accounting
- Litigation Support & Expert Testimony

## VALUATION

- Financial Valuation
- Health Care Valuation
- Litigation Support
- Real Estate Valuation
- Tangible Asset Practice
  - Machinery & Equipment Valuation
  - Insurable Values
  - Property Records
  - Property Valuation

## RISK & ADVISORY SERVICES

- Internal Audit Services
  - Outsourcing & Co-sourcing Services
  - IT Audits
  - Enterprise Risk Management
- Regulatory Compliance & Consulting
  - SOX Compliance
  - PCI DSS Compliance
- IT & Cybersecurity Services
- Fraud & Investigative Services
- Business Continuity Planning
- Cost Recovery Services
- Construction Cost Review & Consulting Services

## REAL ESTATE SERVICES

- Exclusive Tenant Representation
- Program & Project Management
- Strategic Planning & Implementation
- Space Programming & Needs Assessment
- Market Analysis & Site Selection
- Financial Analysis & Review
- Project Budgeting
- Lease Negotiation & Administration
- Move Coordination
- Portfolio & Account Management
- Global Representation

## FOCUSED INDUSTRY SERVICES for

- Agribusiness
- Construction
- Financial Institutions
- Government
- Health Care
- Hospitality & Entertainment
- Manufacturing & Distribution
- Not-for-Profit & Education
- Private Equity
- Professional Services
- Real Estate
- Retail
- Technology & Life Sciences

## AUDIT, REVIEW & ATTEST SERVICES

may be provided by Mayer Hoffman McCann P.C., a national, independent CPA firm.

# Benefits & Insurance Services

When it comes to managing your organization's risk, you deserve a full palette of expertise combined with exceptional quality and service. CBIZ is here to help you reduce your risk, improve your bottom line and help your business grow. Choose from any or all of our services, designed to support your goals and strengthen your mission.

## EMPLOYEE SERVICES ORGANIZATION (ESO)

*CBIZ understands that your people are your greatest asset. That's why we provide Employee Benefits Consulting and Human Capital Management services that enable you to attract and retain the best talent – all while controlling your employee costs.*

### Employee Benefits Consulting & Administration

- Group Health & Welfare Consulting
  - Plan Design Modeling
  - Alternative Funding
  - Captive Insurance Programs
  - Private Exchange Consulting
- Employee Engagement & Communication Services

- Employee Health Risk Management
  - Wellbeing Programs
  - On-site Clinic Consulting
- Legislative & Compliance Support
- Actuarial Services
- Pharmacy Benefit Consulting
- Benefits Administration
  - Online & Telephonic Services
- Voluntary Benefits Consulting

### Human Capital Management

- Human Resources Outsourcing
- Payroll Administration
- Payroll Tax Filing & Deposit Services
- Online Benefits Enrollment
- HRIS
- Time & Attendance Solutions
- FSA/HSA/HRA Administration
- COBRA Administration
- CBIZ HR Solutions (HR on demand)

## PROPERTY & CASUALTY

- Commercial Insurance Lines, including general liability, automobile, property, business income, flood, inland marine, crime/fidelity, workers compensation & umbrella
- Executive & Financial Protection
  - Directors & Officers Liability
  - Employment Practices Liability
  - Privacy, Data Breach & Cybersecurity
- Surety Bonding
- Environmental
- Risk Management Services
- Personal Insurance
  - Home & Auto
  - Boat & Yacht
  - Valuable Articles
- Aircraft
- International Protection
- Professional Liability
- Alternative Risk/Captives

## RETIREMENT PLAN SERVICES

- Advisory
  - Investments
  - Compliance
  - Fiduciary Governance
- Actuarial
- Administration
- 401(k), 403(b), 457, Profit Sharing, Defined Benefit & ESOPs
- Executive & Key Person Benefit Plans
- Employee Education & Communication
- IRS & DOL Compliance

## HUMAN CAPITAL SERVICES

- Executive Search/Recruiting
- Compensation Consulting
- Human Resources Consulting
- Performance Management
- Career Transition Services

## LIFE INSURANCE SOLUTIONS

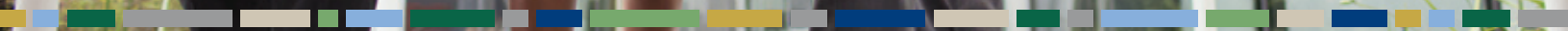
- Wealth Transfer & Estate Planning
- Business Succession, Exit & Transition Planning
- Executive & Corporate Benefits
- Longevity & Retirement Risk Management
- Wealth Accumulation, Protection & Distribution



## AFFORDABLE CARE ACT SERVICES

*CBIZ is the only business services provider in the U.S. with leading accounting, employee benefits, actuarial, compensation and payroll experts working together to develop integrated health care reform solutions to maximize your results, minimize your costs and ensure compliance.*

- Benefit Plan Review
- Compliance Solutions
- Health Reform Communications
  - Health Reform Bulletins
  - CBIZ Health Reform Matrix
- CBIZ HCR Analyzer®
- Small Business Tax Credit Calculator
- ACA CheckPoint Dashboard & Reporting



# We pledge to provide an exceptional service experience to every CBIZ client.

- **Individual Attention:** We will treat each client with the utmost care; we will develop and maintain a strong personal relationship; we will provide service with a commitment to professionalism, trust and the highest level of personal and professional integrity.
- **Responsive:** We will respond to a client's urgent need immediately; we will return all voicemail and email communications within 24 hours; we will deliver and review all work product on a timely and as-agreed basis.
- **Proactive:** We are committed to understanding the goals and needs of our clients, responding to such needs with our best service, advice and products. We will strive to provide our clients with innovative solutions and opportunities to improve and grow their business.

**Our Guarantee:** If you are not satisfied with our responsiveness and the service we have provided, tell us immediately – we will correct the situation to your satisfaction.



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