

PEO EXIT AT A GLANCE YOUR 10-Step Kickoff

1. Confirm Readiness

- Review PEO contract and renewal dates**
- Get leadership buy-in**
- Identify internal project owner**

2. Choose New Vendors

- Payroll provider**
- Benefits broker**
- HRIS platform (if needed)**

3. Gather Data

- Employee roster, W-4s, I-9s**
- Benefits and payroll reports**
- Workers' comp and 401(k) info**

4. Audit Everything

- Verify PTO, tax IDs, deductions**
- Confirm benefits enrollments**



5. Communicate Early

- Announce change to employees**
- Train managers**

6. Run a Test

- Do a parallel payroll test before launch**

7. Align Systems

- Match pay dates, benefits, and balances**

8. Send Notice

- Give written PEO termination notice**

9. Go Live

- Run first payroll**
- Verify deductions and taxes**



10. Close Out

- Confirm COBRA, ACA, and final filings**
- Archive all reports**

