

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

