



BROKER PARTNER GUIDE

Make Business Clients Easier to Serve, and Harder to Lose.

Helpside combines benefits, payroll, HR, and risk support in one regional PEO partnership while protecting the broker's role and client relationship.



1,000+
Active clients served



35+
Years in business



Year Round
New-group enrollment



BROKER COMPENSATION

Two ways to earn, recurring for the life of the account.

\$50

per enrolled employee, per month, on the Master PEO Plan*

OR

15%

of the Helpside administration fee if the group does not choose the Master Plan*

*Compensation is based on health plan participation, or on the Helpside administration fee when a group chooses another plan. Compensation structure subject to change; refer to your broker agreement.



What Is a PEO?

A Professional Employer Organization gives a small employer one coordinated team for payroll and tax administration, employee benefits, HR guidance, compliance support, and workers' compensation and risk management. It does not replace the client's people or HR leader. It gives them specialists, systems, and support to be more successful.



Who Is Helpside?

A relationship-driven regional PEO with expertise serving multistate employers.



The Broker's Ideal Referral

10-99 EMPLOYEES

BENEFITS-READY

GROWTH-STAGE

- An owner or operations leader wearing multiple hats.
- HR that's part-time, tactical, or stretched thin.
- A company that offers, or wants to offer, a health plan.
- A trigger: renewal pressure, service frustration, growth, multistate hiring, or compliance uncertainty.

Helpside's broader fit extends to 2-200 employees, but the ideal fit is a growing company between 10 and 99 employees ready for dedicated HR, benefits, and payroll support.



Why Health Brokers Should Care

- **Real specialists and direct communication**, not a ticket queue or a phone tree.
- **Flexible health strategy**: Helpside plan options, self-funded or level-funded paths, or the ability to retain an outside plan where appropriate.
- **A named Broker Relationship Manager** who keeps you informed at every stage.
- **Recurring compensation** or the life of the account, see rates above, subject to the broker agreement.*
- **Protect the relationship**. Your client stays your client.
- **Create a new option**. Groups can move any month, not just at January 1.
- **Deepen your value, stay flexible**. You're solving benefits, HR, payroll, and risk, not competing on price alone, and Helpside stays a partner, not a competitor for the broker relationship.

Switching Payroll, Made Simple

The most common hesitation is the client picturing a painful system migration. Here's what actually happens.

1

Plan the Transition

Onboarding documents are signed, first payroll and benefits dates are confirmed, and the client meets the implementation team.

2

Set Up Company + Employees

The client completes guided setup in Helpside Tools. Employees get secure links to complete tax, I-9, and direct deposit info online, about 15 to 20 minutes each.

3

Enroll, Train, and Go Live

Helpside runs benefits education and enrollment, trains the client on the Tools platform, and processes the first payroll before a warm handoff to the ongoing team.

Plan for roughly four weeks with benefits included, three weeks without. It's a coordinated project the implementation team runs, not something handed back to the owner or part-time HR contact.

Book a partnership call with Greg Williams
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Talk to Greg →