



**PAYLOCITY**

The Paylocity Tax Division has several core responsibilities, including filing over 45,000 tax returns each quarter, depositing almost \$5 Billion to tax agencies, tax filing in all 50 states plus Puerto Rico in addition to hundreds of local tax jurisdictions.

Paylocity maintains ongoing communication with hundreds of tax authorities to keep abreast of the latest payroll tax laws and procedures.

To ensure that clients' tax returns are error-free, we continually monitor payroll processing for data integrity errors. Paylocity electronically balances the tax accounts on a daily basis to ensure that the appropriate taxing body receives your tax deposits in a timely manner.

**TAX DIVISION LEADERS**

**Chris Moriarty, CPP, Vice President of Tax**

Over 20 years of experience in the payroll field as both a Payroll Manager and Tax Director at 2 Payroll Service Bureaus. Serves on the IRS Reporting Agent Forum, an IRS committee comprised of Tax Professionals from Payroll Services; Member National Payroll Reporting Consortium. These affiliations help us to stay on the cutting edge of any compliance related changes. Chris served as Education Director of the Chicago Chapter of the American Payroll Association.

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**Jennifer Sprouse, CPP, Manager of Tax**

Over 12 years experience in Payroll Taxes, primarily in the Service Bureau sector. An expert Tax & Payroll professional – no tax issue is too complex for Jen. Jen is also an IRS Reporting Agent Forum member and is able to assist customers on all aspects of Entity Changes, Tax Filing issues, Notice Resolution and penalty abatement.

**Robert Yu, Manager of Tax Compliance**

Over 15 years of Payroll experience, Rob has worked as Tax Manager at 2 Payroll Services and a PEO. Rob has extensive experience with Amendments and Tax Return filing, is a Master Tax expert and member of the IRS Reporting Agent Forum.





PAYLOCITY DEPOSITED OVER \$5 BILLION TO THE IRS & STATE AGENCIES, TAX FILING IN ALL 50 STATES PLUS PUERTO RICO, GUAM & THE VIRGIN ISLANDS, ALONG WITH HUNDREDS OF LOCAL TAX JURISDICTIONS.

### PAYLOCITY TAX DIVISION

*We have 25 Tax Compliance and Payroll Operations Specialists ranging from 10 to over 20 years experience in the payroll field.*

Our Tax Division members hold a variety of certifications, including Accounting Degrees, Finance Degrees, MBA's and CPP's (Certified Payroll Professional). They are the front line individuals responsible filings, deposits, notice resolution and amendments.

### CUTTING EDGE DELIVERY OF NEW LEGISLATION

Due to today's economic environment, the frequency of legislative changes affecting payroll taxes has grown considerably. Paylocity has a unique ability to understand the changes on the horizon through the IRS Reporting Agent Forum and other affiliations. We are generally able to release comprehensive system enhancements within days of the legislation taking affect, putting us far ahead of other service providers.

For example, when the American Recovery and Reinvestment Act was signed on February 20 2009 allowing employers to realize a credit for employees electing COBRA coverage, our solution was available to all customers by February 27<sup>th</sup>. While customers of other providers had to wait months later for 941 refunds to realize a benefit, our customers saw credits to their payroll tax liability immediately.

### SERVICE MODEL & ESCALATION PROCESS

We want to serve the tax needs of all of our customers as quickly and completely as possible. It is our primary objective to provide unparalleled service to all customers. In order to ensure that this is the case, ***we have established an escalation procedure.*** If a CSR or Account Manager is unable to help a customer with a tax issue, they should discuss it with their Manager or Team Lead. If the Manager or Lead determines they should escalate the issue, they contact the Tax Managers or Vice President who will respond within 24 hours.