

PORTFOLIO-WIDE VALUE CREATION

Most portfolio companies have no one governing their PEO relationship. We do that.

PEO costs drift without oversight. Workers' comp, SUTA, admin fees, and benefits pricing all move at renewal, and without an independent benchmark, there's no way to know if what you're paying reflects the market.

We provide that benchmark, govern the relationship, and advise when it makes more sense to exit the PEO entirely when the company is ready.

THE GAP

At close, the PEO comes with the company. It rarely gets reviewed. Costs compound quietly. Not because anyone made a bad decision, but because no one was assigned to watch it.

THE EXPOSURE

Without a governance layer, workers' comp rates, SUTA, administration fees, and benefits costs all rise. We surface them in our **PEO Alignment Review**.

OUR ROLE

We sit above the vendor layer, independent of every PEO and govern the relationship on behalf of the portco. Benchmarking, negotiation, structure review. One repeatable process across your portfolio.

6,100+

COMPANIES ADVISED

\$2.3B+

DOCUMENTED SAVINGS

\$2,000+

SAVED PER EMPLOYEE / YEAR

HERE'S HOW IT WORKS

One repeatable process across your portfolio.

1 Is PEO the Right Structure?

We assess whether PEO is the right model for the portco at its current stage and headcount — and what the right structure looks like over the next 18–36 months of growth.

2 PEO Alignment Intake & National Benchmark

The portco completes our structured intake. We benchmark their current arrangement against the nation's leading PEOs — on cost, contract terms, compliance capability, technology and service.

3 The PEO Alignment Review

We compare their current PEO against the nation's leading providers across every cost category. The output is clear, hard data, so the decision is based on governance, not guessing.

4 We Execute — Negotiate or Transition

We either negotiate with your incumbent PEO or transition you to one we uncovered in the review. Your choice. Either way, we drive ROI.

WHAT YOU GET

The governance layer your portfolio is missing.

Cost Clarity

We benchmark the portco's current PEO against the market and quantify the gap. Average savings: \$2,000+ per employee per year.

Diligence Readiness

We identify co-employment exposure, workers' comp gaps, and legacy contract terms before a buyer does. You decide how to address them.

Right Structure at the Right Stage

PEO fit changes as a company grows. We assess when a portco has outgrown its PEO and whether moving to level-funded or self-insured is the better structure, then we manage that transition.

A Portfolio-Wide Value Creation Lever

Most value creation levers require capital, headcount, or months of execution. PEO governance requires none of those. One repeatable process, deployed across every portco, producing measurable margin recovery.

The PEO Alignment Review™

We benchmark every aspect of your PEO spend against the nation's leading providers and deliver the PEO Alignment Review at no cost. The data speaks for itself.

If We Negotiate

Our fee is 30% of the savings we recover with your incumbent. Our performance is aligned with your outcome.

No charge.Zero.

If a better PEO is identified and you transition, we manage the full implementation at no cost to the portfolio company; the selected PEO compensates us.