



Required Documents Needed for Proposal

- ❖ The following is a list of the documents needed for CCPEO Consulting to prepare an accurate proposal.

If You **ARE NOT** currently using a PEO provider:

1. Copy of most recent payroll report.
 2. Copy of Payroll billing, (if using a payroll service provider).
 3. Copy of current workers comp declaration page.
 4. Copy of current TWC/SUTA tax report.
- Possible items to be requested:
 - ✓ 3 year work comp loss runs history.
 - ✓ Employee benefits summary & rates.

If you **ARE** currently using a PEO/outsource provider:

1. Copy of most recent PEO payroll billing report.
 2. Copy of last TWC/SUTA tax report. (if less than 2 years with PEO)
- Possible items to be requested:
 - ✓ 3 year work comp loss runs history.
 - ✓ Employee benefits summary & rates.

Clifford B. Clegg, President
CCPEO Consulting
817-233-4551
cliffordclegg@ccpeoconsulting.com
www.ccpeoconsulting.com