

Webinar: PEO Exit - Considerations for a Managed Transition

07.23.20

As companies outgrow their PEOs, they may feel overwhelmed with the thought of transitioning and developing internal HR functionalities. The transition can seem daunting, but doesn't have to be. Whether you are planning to exit a PEO or beginning to explore new system options, BPM and Sequoia Consulting Group will help you think through considerations and strategies with the multiple moving parts.

During this webinar, we will cover:

- Moving to an internal HR model
- Payroll/HRMS system considerations
- Benefits program design & best practices
- 401(k) transition and fiduciary considerations
- Property & casualty insurance considerations, including Workers' Compensation and employment practices liability
- Making the transition happen

Date: July 23, 2020

Time: 2:00 pm – 3:00 pm PT

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Speakers:



Jill Pappenheimer, MBA, SPHR
Partner, HR Consulting, BPM LLP

Jill brings 30 years of experience supporting the people function for organizations ranging from large financial institutions to small entrepreneurial teams. She has an extensive business management background giving her a unique perspective on traditional HR practices. Jill believes that you need to link people, with technology, and organizational goals and objectives in order to grow and thrive.



Jose Gonzalez
Principal & Vice President, Mid-Size Practice, Sequoia Consulting Group

As the mid-market team leader, Jose is responsible for business development and the overall design and delivery of client solutions for mid-size client experience. He oversees the orchestration of scalable client solutions delivering reduced costs, positive employee experiences, and reduced administration. Jose enjoys working closely with our client service, marketing, and support teams to continue finding innovative ways of meeting the evolving needs of our clients.



Suzette Germano
Vice President, Risk Management, Sequoia Consulting Group

Suzette leads client service for property and casualty clients in the emerging risk and technology space. Building on Sequoia's reputation as a best-in-class employee benefits insurance broker, the Risk Management team delivers a unique partnership experience for clients. Suzette leads the team in diving deep to understand a client's business and the risks and opportunities they face to help them achieve their corporate goals.



Molly Knapp

Senior 401(k) Consultant, Sequoia Consulting Group

Molly joined Sequoia in February 2016 due to their passion for client loyalty and their reputation in the retirement plan industry. Prior to joining Sequoia Consulting Group, she spent 17 years with several 401(k) vendors, most recently 6 years with MassMutual Retirement Services. She has lead hundreds of 401(k) recordkeeper conversions, including many coming off a Multiple Employer Plan (MEP). She is focused on providing employee support, resources, and expertise to increase administrative efficiencies. She guides 401(k) committees so they can make smart decisions and help employees feel equipped to make sound financial decisions. Molly holds a CA life license and has her Series 6, 63, 7, 65 registrations.