



Payroll Vault™

Payroll Re-defined
WE KEEP YOU COMPLIANT

CONTACT

Set up a time to chat:



What is Payroll Vault?

What we do



Payroll Workforce
Management Services



Franchise
System



Technology
Platform

Payroll Vault in Numbers

2008

First year of operations

2013

First year of franchising

60+

Active franchisees

28+

States (& Virgin Islands)
currently with franchises

50

States with territory
available for franchising

15+

Awards &
Recognitions

Payroll Vault at a Glance

Payroll Services & Human Capital Management (HCM)

Locally-owned and client-focused, Payroll Vault has quickly emerged as the leading full-service payroll franchise opportunity for small businesses — current and emerging entrepreneurs.

Experienced Team

With a leadership team of a combined 50 years in experience in payroll services, Payroll Vault was listed #1 in the Business Services (Financial & Tax Category) by Franchise Business Review.

Franchise Model

With an annuitized and non-seasonal revenue model based on the tax services franchise model of the past, Payroll Vault has a strategic Alliance Partner with our software provider by supporting education, training and software system implementation, as well as IFA membership and C-Level CFE status (Certified Franchise Executive)

Franchising with Payroll Vault is **the wise choice**

Advantages	Personal and Professional Services	Food & Beverage Franchise	Retail Businesses	Payroll  Vault™
No Brick-and-mortar Build Out Store Front Optional	✗	✗	✗	✓
Recurring Revenue Monthly, Quarterly, Annually	✗	✗	✗	✓
Leverage National Brand With Single Franchise Location	✗	✗	✗	✓
Labor Accessible & Minimal	✗	✗	✗	✓
Affordable Low-cost Franchise Opportunity	✗	✗	✗	✓
B2B	✗	✗	✗	✓
Licensing Not Required	✗	✗	✗	✓
Easy Accounting No Invoicing, Collections, Credit Cards, or Checks	✗	✗	✗	✓
No Inventory	✗	✗	✗	✓

Growth of a leading payroll franchise



Every month, Payroll Vault pays millions of dollars issuing thousands of paychecks



1980-1989

Affiliate starts offering payroll services in 1987



1990-1999

Payroll services become identifiable income stream



2000-2009

Payroll Vault brand created



2010-2019

Payroll Vault becomes national brand with franchising



2020-2029

Payroll Vault has a clear pattern of success for its goal to become a \$50M revenue brand by 2025, and a \$100M revenue brand by 2030

Experienced executive leadership



Sean Manning
CEO & Founder

- Experienced Entrepreneur
- CPA, CFE
- Board Member & President
- Clear Vision & Leadership

Areas of Expertise

Operational Systems
Strategic Relationships
Project Management
Speaker, Motivator,
Visionary



Tricia Petteys
COO & Co-Founder

- Payroll Systems Expert
- Board Member
- Integrator

Areas of Expertise

Operations Management
Communication
Team Building
System Integration &
Execution



Jessica Martin

Marketing Director, Communications
and Public Relations



Tim Loehfelm

Director of Sales and Client Business
Development



Heather Boemker

Director of Operations Training
& Support

Experienced Investors and Advisors

Board Members



Robert Huntington
CEO of Metric Collective



Joshua Kovacs
CDO of Metric Collective



Kay Wasserman
Co-Founder of Franchise Peer Performance Groups

Investors / Consultants



Investment

Metric Collective is a vertically integrated franchise and technology company that has been helping franchisors and franchisees achieve their business goals since 2011.

Metric Collective invested in Payroll Vault in 2023 after realizing the market need and enormous upside potential available in their innovative franchise model.



Franchise Development

As the exclusive franchise sales partner of Payroll Vault, Oakscale uses its unique skill set of matching the brand with qualified prospective who share a similar ambitious growth mindset.




Franchise Advisory

Franchise Peer Performance Groups are a proactive and powerful tool to drive franchisee growth.

The largest & fastest growing payroll franchise

 Territory currently available

 Territory available pending registration

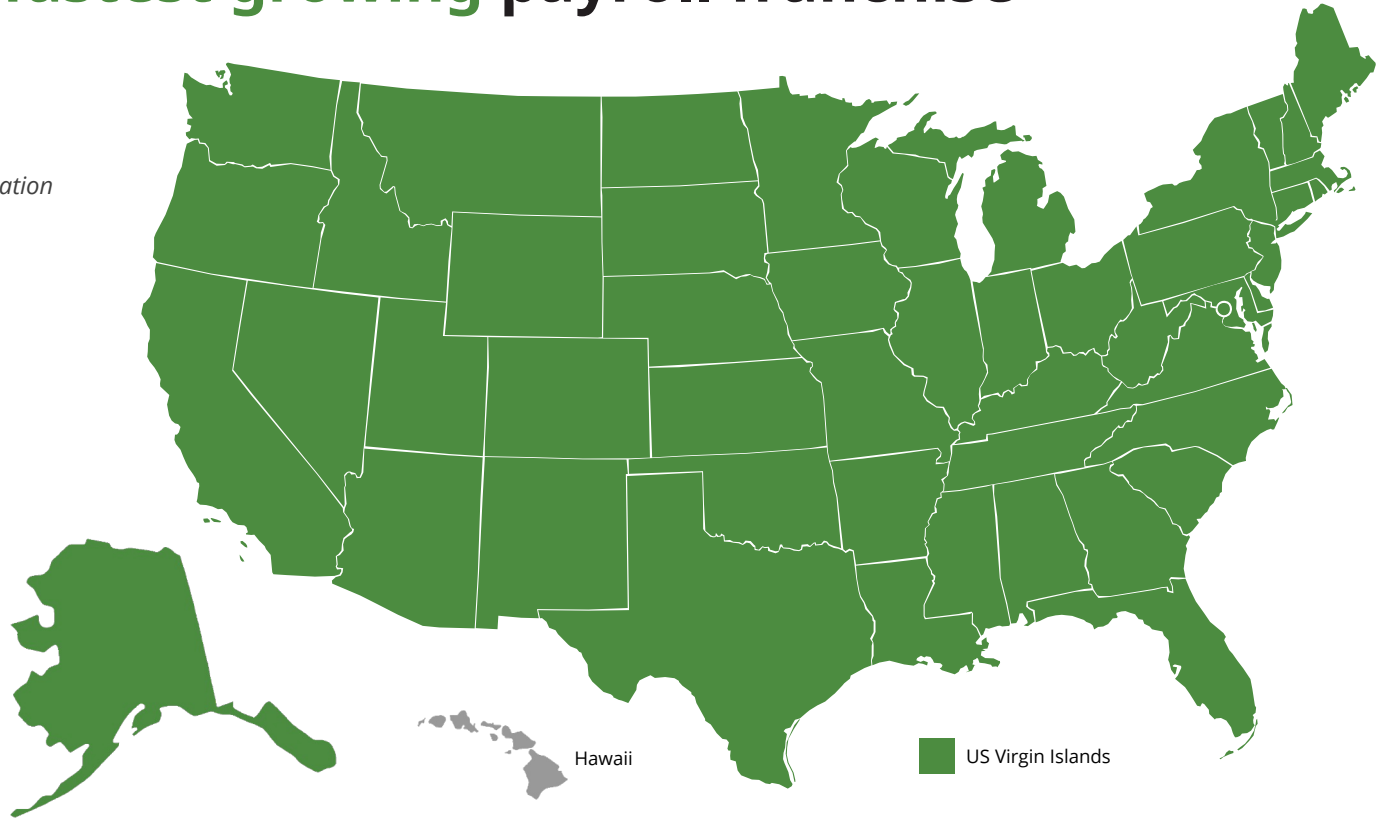
28+

**States & US Virgin Islands
with Franchisee Presence**

AL, AR, CA, CO, CT, FL, GA, IL, IN,
KY, LA, MI, MN, NE, NJ,
NY, OH, OK, OR, PA, SD, TN,
TX, VA, WI, USVI, and more

49

States
Available Now¹



¹All 50 states soon available, pending completion of registrations

Territory that scales with your ambition

Payroll Vault Territory Stats

1

Starting location
sufficient for scalability

150K

People Within Zip
Code Territory

*Larger territory available,
subject to approval*

+75K

Person Zipcode
for \$10K extra

+150K

Person Zipcodes
for \$20K extra

Determining Factors of a Payroll Vault Territory

- ✓ Contiguous geographic area that contains 150k people
- ✓ 90% of businesses are small businesses. Target demographic companies <100 employees, sweet spot 1 - 25 employees
- ✓ Protected online marketing territory, in-bound leads, zip code driven
- ✓ Can provide payroll service to ANYONE across the USA - Scalable with just one location
- ✓ Can work from home, no brick & mortar or office required. Must have professional business street address/Virtual Address located in their territory — NO RESIDENTIAL ADDRESS, NO P.O. BOX ADDRESS
- ✓ Do not need to reside in their territory



Ideal owner profile



\$250K Net Worth
— and —
\$100K Available Cash



Experience in Relationship
Management, Operations,
Sales, and Management



Multi Unit
Owner:
Diversification



Business Owner, Leveraging
Experience & Resources



Legacy Business
Model



Spouse with
Flexibility



Looking for Opportunity
and Responsibility

Investment summary

\$68.5K

Initial Franchise Fee

- Expanded Territory Option - Purchase additional zip codes (75k people/zip code for \$10,000, and 150k people/zip code for \$20,000)
- Military, Veteran, First Responder Discount 10% off Initial Franchise Fee

Month 4

Monthly Ownership Fees Begin

Royalty:	6% with \$400 minimum
Technology Fee:	\$175
Monthly CRM Fee:	\$160
Monthly Digital Fee:	\$105
National Advertising Fee:	\$300
Accounting Fee:	\$195
Managed Social Media:	\$300
Payroll Software Pricing:	\$325, plus: <ul style="list-style-type: none">\$1.70 Per Employee Per Month (PEPM)\$8 Per Client Per Month (PCPM) and \$2 Per Month for Additional State Location



\$1,960.00

Minimum Total per Month

Franchise fee breakdown

What's included with your franchise fee



Company Name, Domain & Website



Logo Development & Trademarks



Website Optimization, Blog & Content Creation



Custom Public Relations, Videos & Testimonials



Marketing Manual & Materials and Sales Playbook & Systems



Operational Systems and Training & Support Manuals



Client Engagement Agreements & Pricing Model



Set-up of Ancillary Services & Vendor Partners



Project Management with Opener Checklist & Support Team



\$68.5K

Initial Franchise Fee

90 days

to be in business with
Payroll Vault

Our Franchisees' financial performance: F/T versus P/T*












Part Time Under 30h per week	Income	Net Profit
Max	\$2,051,129	\$1,182,038
Min	\$20,940	(\$138,320)
Avg	\$243,604	\$104,179
#/% Exceeding	12 of 34 (35%)	12 of 34 (35%)
Median	\$157,553	\$55,967

Full Time	Income	Net Profit
Max	\$2,041,227	\$1,888,755
Min	\$139,384	\$85,723
Avg	\$477,494	\$345,678
#/% Exceeding	2 of 10 (20%)	1 of 10 (10%)
Median	\$268,036	\$183,016



* Shown in Item 19 of the Payroll Vault Franchise Disclosure Document (FDD) — Issued in April 2024

News and awards

 <p>BLOG TALK RADIO</p> <p>Audio Link</p>	<p>All things Franchising 2021</p>	 <p>DENVER BUSINESS JOURNAL</p> <p>Article Link</p>	<p>2020 Largest Colorado- Based Franchisors (Payroll Vault #16) Aug 2020</p>	 <p>Franchise Business REVIEW</p> <ul style="list-style-type: none">• Top 50 for Franchisee Satisfaction• Top Innovative Franchise• Top 200 Franchises• Top Low Cost• Top Franchises for Women
 <p>Forbes</p> <p>Article Link</p>	<p>Back to Business: Your HR and Payroll Checklist Aug 2022</p>	 <p>DENVER BUSINESS JOURNAL</p> <p>Article Link</p>	<p>Here's why Colorado franchisors expect to see huge growth in 2021 Aug 2021</p>	<p>RETAIL & HOSPITALITY HUB</p> <p>The 10 Most Disruptive Franchises to Watch 2020</p>
 <p>13 WTHR</p> <p>Video Link</p>	<p>Understanding Your Rights When Returning to the Workplace July 2022</p>	 <p>DENVER BUSINESS JOURNAL</p> <p>Article Link</p>	<p>BizSpotlight: Payroll Vault Aug 2020</p>	 <p>Forbes</p> <p>Article Link</p> <p>The PPP Playbook: Dispelling Myths and Revealing the Fundamentals July 2020</p>
 <p>ACG Association for Corporate Growth</p>	<p>In the Limelight 2022</p>	 <p>FRANCHISE 500 BY Entrepreneur</p>	<p>Top Low-Cost Franchise 2022</p>	 <p>FRANCHISE Journal</p> <p>Article Link</p> <p>PAYROLL VAULT The Perfect Payroll Solution for Small Businesses is also a Prime Opportunity for Ready Entrepreneurs</p>

Franchisee testimonials



I never imagined being a franchise owner, but after one meeting with Payroll Vault, I quickly became aware of the benefits offered to franchisees. By leveraging their impressive business model and proven systems, I was able to provide the solutions my clients needed, and grow my business.

FranchiseBusiness**REVIEW**[™]

Article Link



Karen Mora
2022 Franchise "Rock Star"

Meet Oakscale, our franchise development partner



As seen in

FranchiseTimes



Entrepreneur

yahoo!
finance

Global
Franchise

Oakscale is a franchise development company

that assists Payroll Vault in identifying qualified franchisees. We help Payroll Vault ensure they uncover prospective franchisees who are passionate about the concept and share the brand's ambitious growth goals and mindset. By outsourcing franchise development Payroll Vault ensures broker leads are worked **quickly** and **effectively**.

Set up a time to chat:





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This information is not an offering. Our franchises will not be sold to any resident of any jurisdiction until (a) the offering has been exempted from the requirements of, or duly registered in and approved by, such jurisdiction and (b) the required Franchise Disclosure Document has been delivered to the prospective franchisee before the sale in compliance with applicable law. The following states regulate the offer and sale of franchises: CA, HI, IN, IL, MD, MI, MN, NY, ND, RI, SD, VA, WA and WI. If you reside in one of these states, you may have certain rights under applicable franchise laws.

CALIFORNIA

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