Alliance Partners Training

Part 1

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Why HR Ledger Wants YOU!

After decades of running a boutique medical insurance general agency we the principals, the founders of HR Ledger learned a lot about California insurance agents and brokers. For the most part they are honest caring men and women working very hard in an extremely business unfriendly state to do the best job they can for the clients they serve. That they value their clients and want to see them succeed. That they are themselves small business people. That they are being legislated out of business by the state they pay taxes to, and the very insurance carriers they write business for are turning against them. Over many years we learned to understand the demands on the brokerage community and grew to admire most of them as true professionals dedicated to serving their clients. With this in mind we decided to open a payroll company that would go to market through the insurance professionals, CPAs, bookkeepers and other business to business professionals that service the business community in California.

For the last 30 years the agents and brokers were also having their books of business being preyed upon by banks and large payroll companies. We saw that, ADP and PayChex were stealing clients away from the brokers we served. This was bad for the broker, bad for us and very bad for the clients who are always better served by a broker. More recently CPAs, bookkeepers, accountants and lenders are being targeted by these vultures.

At first just the big two payroll providers and a few major banks were betraying the trust of the professionals that had for decades been feeding them, but then a few large online insurance agencies were formed to “partner” with smaller banks and payroll companies helping them steal business as well.

So why do we want insurance agents/brokers, CPAs, accountants and bookkeepers as our marketing force? Why do we want them to become our Alliance Partners? Because they already have ingrained in them a desire to advise, help, couch if you will small business owners. Small business owners or SBOs are the backbone of this state and this country. As the politicians have turned against them we must support them for the state and the country to survive. HR Ledger firmly believe that it is up to us the payroll services, CPAs, accountants, insurance agents/Brokers and the other business to business advisors and support companies to do all we can to ensure that the SBOs survive and prosper.

We want to provide these B2B businesses with an additional income stream while shielding their business from the corporate encroachment of banks and payroll companies.