

A PEO's director of risk management needed some convincing: Filejet seemed almost "too good to be true." Today he says, switching from a registered agent to the Filejet platform was like "going from an abacus to a supercomputer."

The Client

As a leading provider of human resource solutions to employers across 18 states, Englewood, Colorado-based [Legacy HR](#) specializes in helping clients simplify complex compliance obligations and keep employees happy and productive.

They're experts, you might say, in helping businesses find a better way.

When it came to managing their entity filings, the company's director of risk management knew they needed a better way.

Maintaining legal compliance can be complicated in the PEO world where multistate co-employment contracts can bring multistate compliance obligations.

For years, Risk Management Director David Loomis used spreadsheets and Outlook reminders to track filing tasks and deadlines in the states where Legacy HR does business, and relied on registered agents to provide updates and notices and compliance support.

The Problem

Over the course of a typical week, Loomis would spend an hour or two on compliance tasks – time, that as he says, "can really add up." The bigger problem was that he was losing confidence in his registered agent, who was slow to forward critical notifications and letters – with some notices coming in more than a month after the agent had received them. It wasn't much help managing entity compliance.

"It was really stressful," he said.



To make matters worse, the agent's fees were expensive – and confusing.

Random invoices arrived, sometimes for services Loomis didn't recognize or had already paid for. At times, he received past due invoices from the registered agent, even though the first invoice had never been mailed.

The sluggish communication, lack of transparency and sloppy invoicing didn't just frustrate him – they concerned Legacy HR's owner too.

Loomis went searching for a better option.

The Approach

Over the years, Loomis had used three different registered agent services, but he had never been happy with any of them.

His search for a reliable partner was littered with dead ends. The agents who appeared in his searches were ones he had already tried or were owned by an agent he had already tried.

Then he came across Filejet, which promised more than a better solution – Filejet would automate the entire process while providing transparency into the status of every filing.

"We didn't even know something like Filejet was out there," he said.

Still, he hesitated. "I'm a risk manager so I'm always looking for the pitfalls," he said. "Our biggest hesitation was ... when something seems too good to be true."

Eventually, Filejet passed the test and the partnership was off to a smooth start.

"I've done a lot of setups of software in the office – it's always a little stressful," he said. "But onboarding with Filejet was great. I sent a big spreadsheet over and they set everything up."

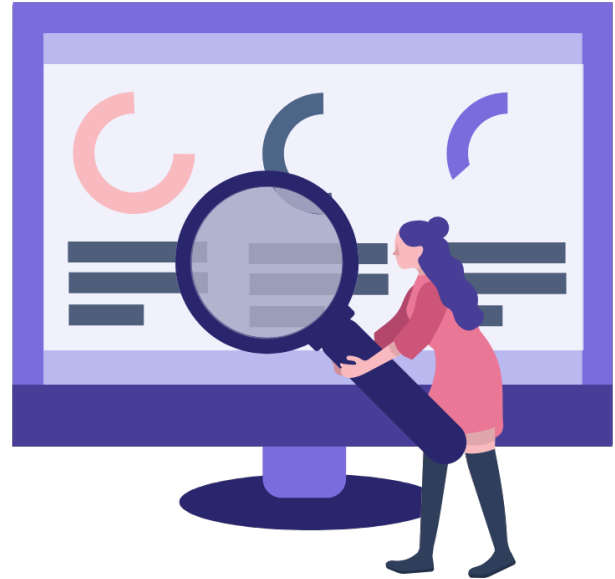
Now, Legacy HR is on Filejet's professional managed platform. Annual filings are handled automatically and new entity formations are a breeze. Filejet acts as the transparent, friction-free, and reliable registered agent and entity compliance partner Loomis was looking for.

The Results

With Filejet "we don't have to worry, 'are we compliant?'" he said. "Now we've got a place where we can go to one spot and see that we are."

Today, Loomis goes into the Filejet portal once or twice a week to check on compliance activities. The transparency of the platform – which lets users see the exact status of every

entity – is a big improvement over the weeks-late snail mail he used to receive from his registered agent and the additional work he was left to manage. More importantly, it's up to the standards of a company built on high standards.



Beyond closing the gaps left by his former registered agent, Filejet has helped Loomis accomplish another goal: "to spend as little time as possible" managing the minutiae of entity compliance.

Loomis can access information he needs on the platform in two clicks. No more endless scrolling and searching and no more spreadsheets.

"Filejet is just so different. Like going from an abacus to a supercomputer."

- David Loomis, Legacy HR Director of Risk Management

It's "much nicer to have someone who can track compliance for you," he said. "The portal for Filejet is the greatest thing. It's all in one spot."

Because the Filejet platform has a dashboard that shows the status of each entity by state, including completion level and deadline tracking, it provides automation and real time visibility that traditional registered agent services can't.

Better yet, Legacy HR is no longer subjected to "random invoices," with all costs for entity management in one place.

Filejet "costs us a lot less for a whole lot more," Loomis said.

In addition to making the day-to-day work of maintaining compliance cost-effective and effortless, Legacy HR is positioned well for continued growth. If an existing client hires an out-of-state employee – or Legacy HR gains a new client – Loomis can quickly add and manage additional entity requirements.

"When one of our clients wants to hire an employee in a state we're not in, Filejet will

make it a lot easier," Loomis said.

"It is a really great fit for PEOs, especially with so much remote work," he added. "I think going in, I was concerned it was too good to be true, but it's been better than expected."



"The portal for Filejet is the greatest thing. It's all in one spot."

- David Loomis



Filejet Is Driving Change

From Filejet's experience: audits show that 44% of Filejet clients have entities they don't know about and 66% have at least one that is non-compliant – due to manual process errors by registered agents or software that issues reminders but doesn't do the work. With a unique combination of service and software that automates U.S. and international annual reports, business license, and DBA filing. Filejet is the entity management solution you don't have to think about. Gain full control over your entities including fees, filing dates, and documents with Filejet. Connect with an entity management [expert](#) today.

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