

Financial Services Firm Rates PLANPAYROLL's Customer Service "the Best"

Jim Almond is President of First Dallas Financial Group, Inc. The four person financial planning firm switched from Wells Fargo to PLANPAYROLL early in 2006.

Jim was frustrated with Wells Fargo's customer service: "Wells Fargo outsources their service to Bombay, India. And there were mistakes made trying to understand them and them trying to understand us—that created a real problem. I think working with PLANPAYROLL's U.S. based customer service is a real plus. All this outsourcing to India really becomes problematic with the accent and the lack of understanding and communications skills between the countries. PLANPAYROLL's customer service is the best I've ever had. It's nice working with people who have a good attitude about what they're doing—and actually like coming to work everyday."

Jim finds the online functionality of PLANPAYROLL a real plus: "Wells Fargo did not have a web interface. They had a web site. But any changes required a phone call. It was slow and cumbersome. Verses I can whip on PLANPAYROLL in about five minutes."

Jim points to the cost savings and the integrated 401(k) as real benefits of PLANPAYROLL: "PLANPAYROLL's fees are definitely lower than Wells Fargo. The admin fees at Wells Fargo were quite a bit more—the setup fee and the on-going maintenance fee. We're saving a lot of money. But the other value is the 401(k) program. I think having the 401(k) option really made a lot of sense for us."