

## Small Transportation Business Counseling Advisors

### 1. Carrier HQ

- a. **Contact:** 155 E. Market St., Ste 210, Indianapolis, IN 46204; phone: (866) 971-5464; email: [info@carrierhq.com](mailto:info@carrierhq.com); website: [www.carrierhq.com](http://www.carrierhq.com).
- b. **Services:** Carrier HQ positions itself as a comprehensive service provider for contractors. It offers drivers access to their own fuel cards, insurance plans, payment options/settlements, load selections, and can assist with DOT compliance. They guarantee approval for all drivers based on the independent contractor's personal credit. It allows independent contractors to obtain auto liability insurance (paid on either a monthly or per-trip basis). It has the capability to pay drivers on any day of the week. Registration process time takes a maximum 10 minutes, and insurance and fuel cards will be set up within 24 hours of registration. If a carrier wants to use Carrier HQ to completely set up their company, the process takes 3-4 weeks.
- c. **Fees:** Program fees vary based on what a carrier is seeking, but range from free to up to \$30 a month. Administrative assistance comes free with the monthly flat fee. Specific fees will be discussed when the carrier contacts Carrier HQ.

### 2. Equinox Business Solutions

- a. **Contact:** Colton Lawrence, President & CEO - (801) 736-9378; company phone: (800) 533-4230
- b. **Services:** Equinox Business Solutions positions itself as a comprehensive service provider. In addition to setting up business entities, its services include mail-forwarding while owner-operators are on the road, fuel maintenance tips, tax assistance, fleet-operator mentor services, credit protection audit shield, back bookkeeping, and roadside assistance. It takes around two weeks to set up a business entity. Once Equinox reviews the contractor's background financial information and moves forward with the business formation, the degree to which Equinox assists the owner-operator is at their discretion.
- c. **Fees:** Equinox has several rates in connection with setting up a business entity: (1) \$275, including state filing fees, when setting up an entity in Utah; (2) \$400 plus state fees for all other states where there is an online filing portal; and (3) \$500 plus fees for states that do not have an online portal. To the extent the contractor is interested in services beyond the initial set-up, the base package is \$15.99 per week, while the premium is \$22.99 per week. There are additional varying costs for continued services.

### 3. American Truck Business Service

- a. **Contact:** Todd Amen, President & CEO - (888) 640-4829

- b. **Services:** The services provided by American Truck Business Service are fairly comprehensive and go beyond the initial business entity set-up. ATBS is equipped to handle both incorporation, either as an LLC or S-corp, along with bookkeeping and accounting services.
- c. **Fees:** ATBS charges a one-time \$299 fee for incorporation services, plus the cost of state filings.

#### 4. [Harbor Trucking Association](#)

- a. **Contact:** [info@harbortruckers.org](mailto:info@harbortruckers.org)
- b. **Services:** Trucker Advantage Program provides access to expert resources and services to grow and make business more efficient, keep informed and education about the intermodal trucking industry, and take advantage of TAP Purchasing Power.
- c. **Fees:** Per TAP website (<https://www.harbortruckers.com/tap-registration>) registration is free and the subscription period is unlimited.

#### 5. [Contractor Business Services, LLC](#)

- a. **Contact:** Pete McCole – (704) 551-0626; company phone: (800) 259-0693
- b. **Services:** CBS offers initial set-up services, in addition continued business management-related services. These include business planning and budgeting, profitability analysis, payroll tax reporting for Sub “S” Corporations, payroll processing with direct deposit, and self-employed pension plan set-up, including IRS filings. CBS handles all aspects of establishing a new business entity, including filing paperwork with the secretary of state and applying for an FEIN. Depending on the state of incorporation, this process takes around 1-2 weeks.
- c. **Fees:** In addition to the state and federal fees associated with establishing a business entity (ranging from \$130-\$250), there is a \$200 fee associated with setting up either a business entity. Additional services include payroll tax reporting for Sub “S” Corporations at \$5 per week and payroll processing with direct deposit at \$25 per pay period. Due to differing state laws, they cannot help with every state and address Sub “S” Corporations on a case-by-case basis.

#### 6. [Glostone Trucking Solutions](#)

- a. **Contact:** Brian Gray, CEO - [Brian Gray | LinkedIn](#); company phone - (503) 607-1088
- b. **Services:** Glostone assists with IFTA registration, fuel tax preparation and filing, IFTA audit assistance, insurance coverage, licensing requirements, any necessary permits or authorities, and can assist with DOT compliance by handling the carrier’s driver file upkeep, providing electronic logging devices, assisting in log auditing, maintenance

management, and overseeing MVR compliance. Glostone also offers onsite drug and alcohol testing through its affiliate, CleanFleet.

- c. **Fees:** Subscription fees for reoccurring services (fuel/mileage tax reporting) are \$75 per truck for those who prefer to operate in paper form, and \$28 per truck for electronic form. Log auditing services are \$20 per driver/month when in paper form, and are \$10 per driver/month when in electronic form. Driver training videos are offered at varied rates- a one-time use \$25 fee for one 30-day access period, or a month-to-month fee of \$10 for those wanting a managed program. Licensing and permit form fees vary based on length- a 1-page form/permit costs \$27, whereas multiple page forms/permits cost up to \$105. Glostone also offers a consultation service in the areas of IFTA, Fleet Management, and FMCSR's at the rate of \$125 per hour.

## 7. [OpenForce](#)

- a. **Contact:** Leigh Ann Schneider, Head of Sales ([LeighAnn.Schneider@oforce.com](mailto:LeighAnn.Schneider@oforce.com)); company phone – (800) 742-7508
- b. **Services:** OpenForce offers initial set-up services, in addition continued business management-related services. These include, but are not limited to, onboard services, payroll settlement service (including the option to file a client's 1099 Form), and the ability to assist in obtaining required insurance. OpenForce is also able to complete background checks on potential drivers on the behalf of their clients. Set up time varies depending on what services the client is seeking.
- c. **Fees:** Program fees vary based on the services the client is seeking. There is a one-time set up fee of around \$2,000 if the client is a company, and one-time fee for independent contractors of \$25, both of which may be lower depending on the OpenForce programs they wish to use. Specific rates will be given once the client contacts OpenForce.

## 8. [Mazuma](#)

- a. **Contact:** Michael Gallegos, Business Development Manager, company phone: (801) 647-2879
- b. **Services:** Mazuma provides accounting and bookkeeping services to small businesses of all kinds, but its publications indicate it has served owner-operators and fleet owners in the transportation industry for at least ten years. According to its marketing materials, Mazuma's standard plan for owner-operators includes monthly bookkeeping, business and personal tax return filing, a dedicated accountant, IRS audit protection, industry-leading financial tools, in-depth tax planning sessions, and month-to-month payments with no contract.
- c. **Fees:** Program fees vary based on what an owner-operator or fleet owner is seeking, but the standard owner-operator plan is offered for \$180 per month.

## **Small Transportation Business Insurance Brokers**

### **1. McGriff Insurance Services, Lee's Summit, MO**

**Contact:** Stacy Spurgeon, Senior Vice President, company phone: (816) 927-3474 and email: [sspurgeon@mcgriff.com](mailto:sspurgeon@mcgriff.com) or Luz Batallas, Account Manager, company phone: (816) 927-9706 and email: [luz.batallas@mcgriff.com](mailto:luz.batallas@mcgriff.com).

**Website:** <https://www.mcgriff.com>

### **2. True North Companies, Cedar Rapids, IA**

**Contact:** Trent Tillman, President, company phone: (319) 364-5193 and email: [ttillman@truenorthcompanies.com](mailto:ttillman@truenorthcompanies.com).

**Website:** <https://www.truenorthcompanies.com>

### **3. Aon, Little Rock, AR**

**Contact:** Todd Denton, Managing Director, company phone: (501) 374-9300 and email: [todd.denton@aon.com](mailto:todd.denton@aon.com).

**Website:** <https://www.aon.com>

### **4. Marsh, Atlanta, GA**

**Contact:** Craig Dancer, Leader, National Transportation Group, company phone: (678) 942-1400 and email: [craig.dancer@marsh.com](mailto:craig.dancer@marsh.com).

**Website:** <https://www.marsh.com>

### **5. Cottingham & Butler, Dubuque, IA**

**Contact:** Chris Patrick, Senior Vice President, company phone: (800) 793-5235 and email: [cpatrick@cottinghambutler.com](mailto:cpatrick@cottinghambutler.com).

**Website:** <https://www.cottinghambutler.com>

### **6. AJ Gallagher, Kansas City, MO**

**Contact:** Ryan Pfeiffer, Area Senior Vice President, company phone: (630) 773-3800 and email: [ryan\\_pfeiffer@ajg.com](mailto:ryan_pfeiffer@ajg.com).

**Website:** <https://www.ajg.com>

### **7. HNI, Milwaukee, WI**

**Contact:** Mike Natalizio, CEO, company phone: (262) 782-3940 and email: [mnatalizio@hni.com](mailto:mnatalizio@hni.com).

**Website:** <https://www.hni.com>