Forward Looking Statements

This document and other written or oral statements made from time to time by ADP may contain “forward-looking statements” within the meaning of the Private Securities Litigation Reform Act of 1995. Statements that are not historical in nature and which may be identified by the use of words like “expects,” “assumes,” “projects,” “anticipates,” “estimates,” “we believe,” “could be” and other words of similar meaning, are forward-looking statements. These statements are based on management’s expectations and assumptions and are subject to risks and uncertainties that may cause actual results to differ materially from those expressed. Factors that could cause actual results to differ materially from those contemplated by the forward-looking statements include: ADP’s success in obtaining, retaining and selling additional services to clients; the pricing of products and services; changes in laws regulating payroll taxes, professional employer organizations and employee benefits; overall market and economic conditions, including interest rate and foreign currency trends; competitive conditions; auto sales and related industry changes; employment and wage levels; changes in technology; availability of skilled technical associates and the impact of new acquisitions and divestitures. ADP disclaims any obligation to update any forward-looking statements, whether as a result of new information, future events or otherwise. These risks and uncertainties, along with the risk factors discussed under “Item 1A. Risk Factors” in our Annual Report on Form 10-K for the fiscal year ended June 30, 2012, should be considered in evaluating any forward-looking statements contained herein.
Discussion Points

- Business Overview
- Market Trends & ADP Strategy
- Financial Strength and Capital Allocation
- Q&A
About ADP

One of the world’s largest providers of business outsourcing solutions and services for...

- Employers ($9B*)
  - Human Resources
  - Payroll
  - Benefits
  - Retirement Administration
  - Tax Payments & Compliance
- Vehicle Dealers ($1.7B*)

* Fiscal 2012

“The granddaddy of SaaS”
– Computerworld
Industry Leadership

- ADP pays 24 million (1 in 6) workers in U.S., and 10 million abroad
- Moved about $1.3 trillion in U.S. client funds in 2012*
- Processed nearly 48 million W-2s* as the largest IRS taxpayer in 2012
- Hosts more than 2 million completed performance reviews
- Invested $1B in HCM product development and acquisitions over last 4 years
- #68 on Forbes’ “World’s Most Innovative Companies” list in 2012

Our People

- 57,000 associates worldwide
- Manage 2,000+ tax agency relationships in U.S. and abroad
- Provide service and support in 26 languages

Financial Stability and Resources

- 1 of only 4 U.S. companies rated AAA by S&P and Moody’s
- $10.7 billion in revenue* – #255 in the 2013 Fortune® 500
- Fiscally conservative – minimal long-term debt
- Dividends paid to shareholders continuously since 1974

*ADP’s Fiscal Year 2012, ended June 30
Market Trends
& ADP Strategy
Four Critical Trends for Businesses Today

Pressure to be more strategic

Intensifying Compliance Burden

Evolving Workforce Demographics

Integrate, Simplify, and Unify

Attracting, Developing, & Retaining Talent
HCM Market: Large and Growing

HCM U.S. market size in $ billion*

<table>
<thead>
<tr>
<th>Service</th>
<th>Value</th>
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<tbody>
<tr>
<td>Insurance</td>
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<td>Retirement</td>
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<tr>
<td>Talent Management</td>
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<tr>
<td>Payroll – Service Bureau</td>
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<td>Payroll – Software</td>
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<td>Time and Labor Management</td>
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<tr>
<td>Accountants</td>
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<tr>
<td>Tax Credit Services</td>
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<td>Expense Management</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>51</strong></td>
</tr>
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</table>

$90 billion global market

U.S. 57%

Int’l 43%

* ~7% growth

Sources: IDC, Nelson-Hall, Gartner, Everest, Bersin, Census Bureau, BLS, ADP and competitor filings, and ADP
The Human Capital Management Spectrum

- Recognition, Merit, Compensation
- Career and Individual Development
- Performance Management
- Engagement, Goal Alignment
- Time & Labor Management
- Retirement, Succession Planning
- Benefits Administration
- On-Boarding, Learning
- Recruiting: Sourcing, Screening, Selection
- Career and Individual Development

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Key Employer Services Offerings

- Human Resources Administration
- HR Outsourcing
- Payroll
- Time & Labor Management
- Benefits
- Added Value Services (Tax, Insurance)
- Talent Management
- Recruiting
- Global/Multinational

Employer Size
- Small
- Mid-size
- Large

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End-to-End Human Capital Management

Cloud based Software

- Talent Management
- HR System of Record
- Time and Labor Management
- Payroll
- Benefits

Delivered as a Service

Seamless integration. Complete End to End Suite. Cloud Based Delivery
Industry Vision: Comprehensive HCM with Robust Multi-Channel User Experience

- One source of truth for full spectrum of stakeholders
- Unique user interactions and intuitive interface
- Rich analytics

- Personalized dashboard
- Search
- Business Intelligence
- Workflow / Inbox
- Talent profiles
- Org charts
- Calendar
- Reporting
- Employee self service
Key Dealer Services Offerings

- Dealer Management System
- Business Intelligence
- Business Process Outsourcing
- Deal Management
- Digital Marketing
- Mobile Solutions
- Phone Systems & Networking

Total Market Opportunity = $17.5 Billion
Financial Strength & Capital Allocation
ADP is one of four non-financial companies rated AAA by both leading U.S. rating agencies

Large recurring revenue base resulting in strong, consistent cash flow generation, enables investment in business

Low capital requirements

Capital allocation and shareholder friendly actions

- Strategic acquisitions – international expansion and entering adjacent markets that complement our core solutions
- Consistent share repurchase program via open market; reduced common stock outstanding ~10% over past 5 years
- Dividend payout ratio of 55-60%; increased dividend 38 consecutive years

ROE of over 20% last five years
Summary
ADP: Helping Organizations Focus On What They Do Best

Forbes
The World’s Most Innovative Companies
2012 Rank: #68

2012 Rank: #7

InformationWeek 500
2013 Rank: #19

DiversityInc
2013 Rank: #16

Chief Executive
2013 Rank: #19

BEST COMPANIES FOR LEADERS

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- Innovation
- Product Leadership
- Service Excellence
Use of Material Contained Herein

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