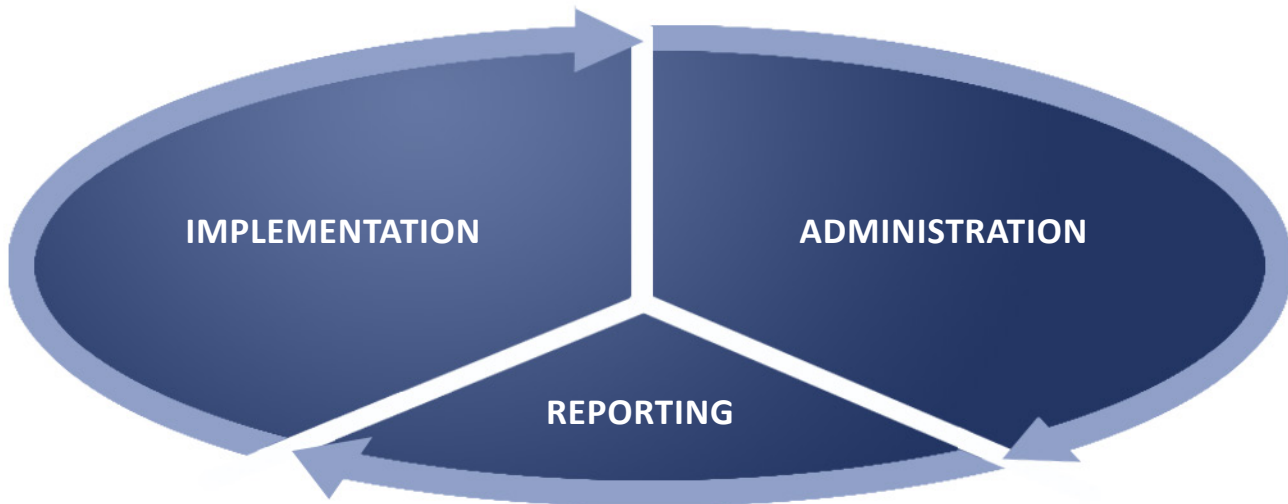


Building a dynamic equity compensation plan can attract the best talent

We Get It. Administering equity compensation plans is much more complex than just issuing awards or grants to participants and tracking those awards on a spreadsheet. IRS and SEC regulations alone can drain company time and resources. Careful planning and support are a solid start to ensuring an ROI on your plan investment. **We Can Help.**

Equity Compensation Services

Our team can help you during the design of a new plan or the allocation of a current one.



IMPLEMENTATION

- Data conversion from spreadsheets to system templates
- Data up-load and reconciliation
- Expense reconciliation

ADMINISTRATION

- Maintain and up-date system data
- Daily transactions
- Participant support/resource

REPORTING

- Identify reporting requirements by department - Treasury, HR, Finance
- Schedule daily, monthly, quarterly and year-end reports required
- Create custom reports as needed

For more information regarding how Accretive Solutions can assist your company with Equity Compensation services, please contact your local Client Development Manager.

CASE STUDY

CHALLENGE

A rapid growth financial services company had contacted us just after completing their IPO and had not decided on an administration solution, or selected an administration platform/system. Our client needed to get their data scrubbed and confirm its completeness, select an administration platform and get their data loaded and reconciled. They also needed to integrate the equity plan administration with their selected broker, as well as work out share movement logistics with their transfer agent bank. This all needed to be in place before the six month lock up expired and employees were able to sell their equity plan holdings.

SOLUTION

We recommended a platform and simultaneously scrubbed their data, insured its completeness, implemented the equity administration platform and began loading data to the system. We reconciled the data that the client signed off on and coordinated the equity plan administration process with the broker and transfer agent bank. We advised the client on the funds transfer process and documented the entire workflow of activity.

RESULT

The entire equity compensation solution was completed prior to the expiration of the six month lock up and employees were able to transact on the equity plan on Day One.

We Get It. With more than 30 years of professional services experience providing coordinated, cross functional teams, we stand ready to help our clients address their most pressing challenges.

To arrange a business meeting with one of our experts, contact your local Client Development Manager.