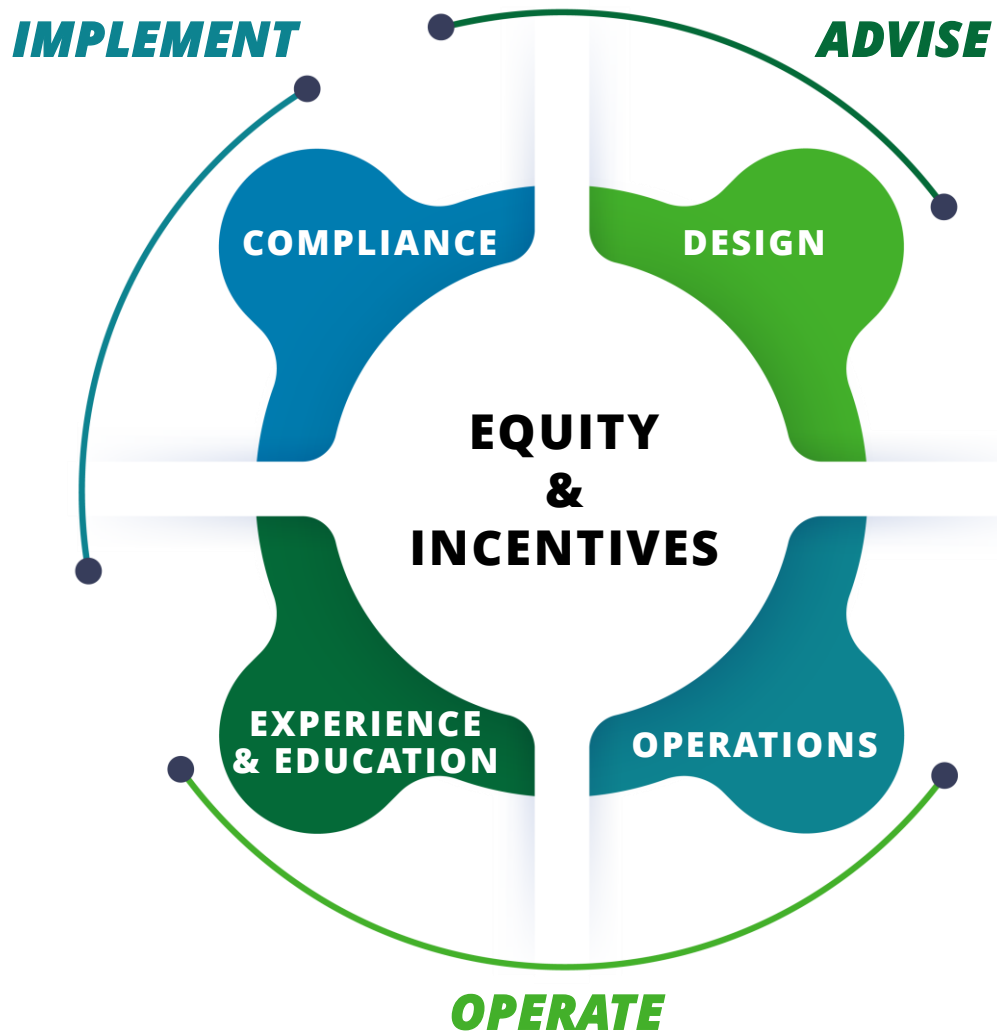


Incentives



Experience
*when and where
it matters*



Activating compensation strategy through equity and incentives design, compliance, education and operations



Multi-disciplinary team, comprising specialists in compensation design, tax, accounting, equity system operation, payroll, and employee experience



Technical and practical depth across geographies and industries



People empowered by technology to help you enhance employee experience and drive operational excellence



Network of over 500 dedicated equity and incentives professionals in over 140 countries

Equity and Incentives

Scope of services



DESIGN

1. Short- and long-term, cash and equity-based incentive plan design
 - a. Benchmarking eligibility and opportunity
 - b. Payout and performance curves
 - c. Metrics
 - d. Risk profile
 - e. Affordability
 - f. Dilution
 - g. Global tax and accounting
 - h. Corporate governance



COMPLIANCE

1. Employment tax compliance and advisory
 - a. IRC 409A
 - b. Global tax analysis
 - c. Mobile employees
2. Strategic employment tax review
3. Global equity plan tax notifications and filings (e.g., UK ERS, Australia ESS, etc.)
4. Corporate deduction (recharge) analysis and strategy
5. Accounting (US GAAP and IFRS) for share plans
 - a. Technical accounting
 - b. Share fair value modeling
 - c. DTA analysis
6. Corporate transactions (M&A, IPO, divestitures, etc.)



EXPERIENCE & EDUCATION

1. Plan design and operation materials
2. Engaging and creative equity communication campaigns
3. Country tax summaries
4. In person and virtual presentations
5. Individual briefings (mobile employees, executives)
6. Global stakeholder (internal and external) onboarding and training



OPERATIONS

1. Equity administrator vendor selection
2. Equity administration system implementation
 - a. Payroll / HRIS connectivity
 - b. Mobility module set up and configuration
3. Stock plan administration outsourcing
4. Stock administration process documentation and analysis
5. Corporate transaction related data management (e.g., divestiture or IPO adjustments)
6. Global payroll process review and documentation

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