



Premier Client Program

Turnkey suite of services provides guidance, training and documentation support

Organizations need greater access to knowledge and resources to navigate the complexity of stock plan regulation. Stock & Option Solutions' Premier Client Program is a unique offering that enables a simple and effective way to enhance and extend the capabilities of your company's existing administration infrastructure.

Access to Extensive Knowledge Base of Stock Administration

Our Premier Client Program Knowledge Base represents nearly a decade's experience from the largest stock administration consulting group in the industry. We understand what it takes to manage a stock administration department. We leverage the collective knowledge, experience, and expertise from over 100 senior stock administration consultants.

Dedicated Expert Support

Have you ever had a stock plan related question but no dedicated resource to turn to? Sometimes vendor call center and bulletin board support is not enough. Whether it's a consultation session, informative content or training programs, the Premier Client Program gives you 24/7 access to proven effective methods for tackling all your stock administration needs.

There When You Need Us

Business does not always go according to plan. Whether you are faced with a regulatory investigation or simply responding to an urgent internal request, the Premier Client program mobilizes necessary resources when you need it. No matter what comes your way — have peace of mind that SOS will be there.

Stock & Option Solutions' Premier Client Program gives you a strategic advisor to help manage and administer your equity compensation plans efficiently and effectively. Through this program, you can maximize peak performance with a choice of three different service packages.

Different Levels of Support Tailored for Your Organization's Needs

Under the Premier Client Program, clients can select a tier of service based on the extent of assistance needed. All levels include a dedicated support team and a strategic advisory consultant.

Benefits (per year)	Tier 1	Tier 2	Tier 3
Premier Support	25 hrs	50 hrs	100 hrs
Strategic Planning Engagement	1 meeting	2 meetings	2 meetings
Educational/Training Webinars	2 sessions	4 sessions	6 sessions
SOS Stock Administration Guidebook	Included	Included	Included
Database Audit Program	Not included	1 audit	1 audit
SOS Document Resource Library	1 document	2 documents	5 documents
Participant Satisfaction Survey	Not included	1 survey	2 surveys
Discount on SOS products/services	5%	7.5%	10%

Premier Support Exclusive access to SOS' expertise through a dedicated phone number, e-mail, and experienced service team for consultations on a variety of equity compensation issues. This service is also useful for our clients that need ongoing support assistance after a project is completed with SOS.

Strategic Planning Engagement Starts with an on-site meeting with your team to provide strategic evaluation and guidance on your equity program's goals, administration infrastructure, resource training, and future initiatives. Each session includes a consultative discussion (up to 4 hours), followed by a high-level written summary of your equity compensation strategic plan.

Educational/Training Webinars Designed for corporate administrators and stakeholders, our webinar series provides up-to-date education on a variety of equity compensation topics. You can participate in one of our pre-scheduled webinars hosted by a live presenter or request pre-recorded webinars to view at your convenience. New topics are added on a regular basis.

SOS Stock Administration Guidebook Written by experienced senior-level SOS stock administrators and consultants, this practical handbook provides administrative tips and recommendations for a full range of equity compensation tasks. You will automatically receive updates to the guidebook, which are issued annually.

Database Audit Program The SOS Data Audit Program is an automated data verification process that validates over 60 types of core stock plan data. The output consists of a standard report with statistical metrics and underlying detail to enable analysis and data clean-up. This is a beneficial process to run regularly in addition to your standard audit/reconciliation procedures, as it provides an independent third-party validation of your database. Each audit includes one data generation and the associated output reports.

SOS Document Resource Library Compiled by our experienced consulting staff, this library of various documents consist of over 20 templates that can be customized to your needs. Save time by utilizing these documents, rather than starting from scratch. New documents are added on a regular basis.

Participant Satisfaction Survey SOS works with you to design an on-line participant satisfaction survey to gain feedback from your employees. Surveys generally run 20-30 questions and include analysis reports to assist you in refining the programs offered to participants.

Discount on SOS Product and Services As a Premier Client, your company will receive exclusive discounts on our products and services while you maintain a Premier Client agreement with SOS.

Program Advantages

- **Maximum Flexibility**
At any time, you can add additional services listed outside of your package to meet your needs. These may include more service hours, webinars, template documents, or surveys.
- **Automatic Program Updates**
In addition to content updates provided regularly, any new services introduced into the program will automatically be included in your existing package.
- **Pricing Benefits**
Purchasing these services on an a la carte basis increases your costs significantly — your cost savings under the Premier Client Program starts at 20%, not counting the potential discounts you can receive on other services!

Tier	Savings	Discount on SOS Products and Services
1	20.00%	5.00%
2	23.66%	7.50%
3	27.60%	10.00%

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