



Aspirations 2011

An Emerging Company
Conference hosted by:  **Stock & Option Solutions**

Program Schedule

| Start | End | Session | Speaker(s) | Location |
|-------|-------|--|---|----------------------------|
| 8:00 | 8:30 | Registration & Continental Breakfast | | Registration & Salon A-D |
| 8:30 | 8:45 | Welcome! | Elizabeth Dodge, Stock & Option Solutions | Salon A-D |
| 8:45 | 10:00 | General Session: Soup to Nuts: The Complete IPO Process for Your Stock Plans | Wendy Davis, Cooley LLP John Hammond, AST Equity Plan Solutions Jennifer Namazi, Stock & Option Solutions Joanne Burns, Financial Engines, Inc. | Salon A-D |
| 10:00 | 10:30 | Morning Break | | |
| 10:30 | 11:45 | Tracking Your Stock: Cap Table Basics Pre-IPO and Transfer Agent Details Post-IPO | Josh McGinn, BNY Mellon Shareowner Services Marianne Snook, Stock & Option Solutions Jeremy Wright, Two Step Software | Salon E |
| 10:30 | 11:45 | Winds of Change: Changes to Accounting Practices Post-IPO | Jon Burg, Radford, An Aon Hewitt Company Elizabeth Dodge, Stock & Option Solutions Takis Makridis, Equity Methods Winny Van Veeren, Vanveeren Consulting | Salon A-D |
| 10:30 | 11:45 | Talk Isn't Cheap: Keys to Communications with Private Company Participants | Barb Baksa, NASPP Scott Barrall, Deloitte Kim Kovacs, OptionEase, Inc. Jennifer Namazi, Stock & Option Solutions | Portland Room |
| 11:45 | 1:30 | Lunch / General Session: Front Lines | Lora Blum, Corporate Counsel, LinkedIn Emily Cervino, CEP, Director, Certified Equity Professional Institute, Santa Clara University Mike Taylor, Vice President of Finance, Tesla Motors | Seattle Room/ Salon A-D |
| 1:30 | 1:45 | Session Change | | |

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|--------------|------------|--|--|-----------------|
| 1:45 | 3:00 | A Not So Simple Choice: What You Need to Know About Vendor Analysis & Selection | Chris Dohrmann, Morgan Stanley Smith Barney Pam Ellis, Solium Capital Laura Reis, Stock & Option Solutions | Portland Room |
| 1:45 | 3:00 | International Considerations for Private Companies | Valerie Diamond, Baker & McKenzie Jon Doyle, International Law Partners LLP Mark Miller, Deloitte Tax, LLP Marlene Zobayan, Rutlen Associates LLC | Salon E |
| 1:45 | 3:00 | Equity Comp by Design: Plan Design for Emerging Companies | Elizabeth Dodge, Stock & Option Solutions Brett Harsen, Radford, An Aon Hewitt Company Craig Tanner, Reed Smith LLP Alison Wright, Baker & McKenzie | Salon A-D |
| 3:00 | 3:30 | Session Change | | |
| 3:30 | 4:45 | Using Equity Comp to Keep Employees In their Seat Post-IPO | James Humza, Bank of America Merrill Lynch Michael Guerra, EASI Fred Whittlesey, Compensation Venture Group | Portland Room |
| 3:30 | 4:45 | Surviving Common Private Company Complaints (early exercise, ISO limits, non-employee grants) | Danielle Benderly, Perkins Coie LLP Ed Burmeister, Baker & McKenzie Jannet Calix, SVB Analytics, Inc. Renee Deming, Cooley LLP | Salon E |
| 3:30 | 4:45 | Insider Edition: What You Need to Know about Insiders & Insider Trading | Geir Fjugstad, Credit Suisse Securities LLC Andrew Schwartz, BNY Mellon Shareowner Services Dan Walter, Performensation | Salon A-D |
| 4:45 | 6:45 | Networking Cocktail Reception | | Poolside |