

Product Spotlight: ESPP and SOS Outsourcing

Does managing your ESPP feel like a second job for you? Then let SOS Outsourcing take over, and allow you to get back to your first one.

The predictions of the demise of Employee Stock Purchase Plans (ESPPs) due to expensing have proven to be untrue. These plans are as popular as ever. While they are a huge benefit for your participants, administering these programs can be disruptive and time-consuming because so much needs to get done in such a short period of time. The added stress and workload on your already busy schedules is a serious issue, and may result in errors that effect your participants, impact morale, and may even cause loss of staff.

SOS Outsourcing is completely customizable to the needs of each of our clients, and offloading the management of your ESPP is one significant way our clients choose to leverage that flexibility. Further, SOS outsourcing works with the platform you've chosen for administration. Using our services does not require changes to your platform or broker.

- Participant education
- Management of the open enrollment process
 - Participant communications
 - New enrollments, changes in contribution levels, withdrawals
 - Work with payroll on deductions
- Database updates
 - Participant data
 - Plan settings
- Purchase processing including coordination with Transfer agent and broker(s)
- Audit, reconciliation and share balancing
- Assistance with payroll reporting in multiple jurisdictions
- ESPP accounting, including modification accounting
- SEC Form 4 filings, if applicable
- Disposition tracking
- 6039 (Form 3922) filings

Whether you are looking to selectively outsource certain stock plan-related functions (like ESPP administration), or want SOS to take more off your plate, with SOS you will work with an expert who sits on your side of the table; a completely accountable part of your team focused on providing the high level of service to your participants and your colleagues you demand, while giving you the ultimate in resource flexibility and cost efficiency. A win-win for your business.

To learn more, and get pricing for outsourcing your ESPP administration to SOS, [please click here](#).