

What is SOS Stock Plan Outsourcing?

We have made stock administration simple, by offering the most comprehensive outsourcing service in the marketplace. Between the burdens of ever-changing regulations/compliance, tax accounting, legal, communication, and system requirements. Why entrust this function with someone who already has a full plate and has anything less than the highest level of expertise?

Whether you are looking to outsource only the day-to-day administrative tasks, or need us to handle the equity accounting, Section 16, and participant education, SOS Outsourcing is flexible enough to accommodate your unique requirements and evolving needs.

Implementation and Process Documentation

SOS's thorough implementation and process documentation is just one of the defining features that sets us apart from the competition. Upon implementation of our solution, our people and processes are completely integrated with your company's existing operational structure and cross-functional team, ensuring accountability and transparency in the management of your stock programs.

We begin by assigning you a dedicated account manager, with experience that complements your company profile. Your account manager, backed by our team of subject matter experts, performs a best practice gap analysis. Our team of administrators document internal process flows and define each parties' responsibilities. After both parties feel entirely confident with the processes that have been set up, the outsourcing routine begins.

Your Dedicated Account Manager

We appoint a dedicated account manager to handle your equity plan and serve as your main point of contact. Our people and processes completely integrate with your company's operational structure and ensure accountability and transparency in the management of your stock programs. Your account manager will handle all facets of your equity program including:

- Day-to-day administration and overall plan management
- Employee transactions
- SOX documentation updates
- Section 16 assistance
- Capitalization table management and reconciliation
- Equity accounting
- End-to-end purchase processing
- Financial and ad-hoc requests and/or reports
- Policy and procedure enhancements
- Participant support, communications and education
- Liaison between transfer agents, brokers, auditor and outside legal counsel

Why SOS?

Experience - Founded in 1999, SOS has become the largest consulting firm dedicated to compensation in the United States, making the CEP Honor Roll. We are proud of our team for their dedication to excellence by participating in continued education and training.

Expertise - Our team based approach and combined expertise assures that we have the experience to handle even the most perilous stock plan challenges.

Flexibility - You don't adapt to us; we adapt to you. There is no "one size fits all" approach when it comes to providing the assistance that a client needs. We understand that every company is different and has varying needs for coverage of the equity plan across legal, payroll, administration, and accounting.