



SOS Solutions Webcast: The Professionals: Beyond Resources

Please note this webcast does NOT qualify for CEP credit.

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Materials Slides

http://www.sos-team.com/pdfs/professional_resources.pdf

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Agenda

- What are SOS Professional Resources?
- Who are we?
- How can we help you?
- Learn More

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What are SOS Professional Resources?

- Advisory guidance
- Compliance expertise
- Special projects, not part of normal daily activity
 - You name it, we've done it. We combine our experience and data expertise with our vast industry knowledge to deliver solutions in any stock plan environment.
- Improve the accuracy and efficiency across all areas of your equity plans



Who are we?

- Specialized Equity Compensation Consultants
 - Certified Equity Professionals (CEP)
 - Industry experts/speakers
 - Equity software knowledge of a variety of systems
 - Extensive experience



How can we help you?

- Corporate Actions
 - Tender Offers (option exchanges)
 - Spin-offs, Mergers & Acquisitions
 - Stock splits
 - Project Management
 - Communication material and delivery
 - Actual equity adjustment work within equity platform
 - Accounting related adjustments and modifications, reconciliations
- Analysis & Recommendations (A&R)
 - Review current processes and documentation
 - Provide improvement plan
 - Assist with improvements
- Vendor Searches
 - Prepare RFP, analysis and recommendations
 - Assist with movement to new vendor

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How can we help you?

- Procedures & Process Documentation
 - Usually in conjunction with A&R or conversion to new system
- New Plan Review and Rollout
 - Identify issues for administration
 - Suggestion for amendments or change prior to approval
- Communication and Training
 - Participant level
 - Stock Administration
- Process Automations

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How can we help you?

- Accounting Requirements
 - Volatility, DTA, Forfeiture Rate
 - Modifications, Non-employee
 - ESPP expensing / modifications
- Data conversions
- Proxy reporting
- Beck & Call arrangements
 - Call only when you need help/guidance
 - Expert resource for new/unfamiliar equity issues
 - Setting up performance grants
 - ESPP questions/issues

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Learning More

- SOS Sales Team can provide documentation and questionnaire
 - Set up an initial discovery call

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Contact Information



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