GEO’S 15TH ANNUAL CONFERENCE

On 7-9 May 2014, the Global Equity Organization’s (GEO) 15th Annual Conference hosted many of the industry’s senior representatives from around the world at an educational and networking event in Miami, Florida. In attendance were some of the industry's best expert speakers, senior level Issuers and key advisors and suppliers, from across the globe.

With a tailored agenda that addressed specific concerns and issues directly affecting GEO’s members, the conference boasted an impressive schedule with a world-class keynote line-up, and more than 50 panel sessions and technical presentations.

The Conference also featured six facilitated networking opportunities in addition to the regularly scheduled networking breaks, all specifically designed to enhance attendees’ networking experiences.

Conference highlights included the ever-glamorous GEO Awards and the launch of GEO’s online member forum, GEOconnect. The new member benefit allows members to share valuable information and to meet new and useful contacts with whom to network freely, enhancing our members’ business opportunities and assisting with career and personal development.

“We GEO attract more senior Issuers year after year as they provide such a good platform to exchange best practices and discuss problems, specifically with regard to administration of global equity plans”

BETTINA GOHM, SIEMENS AG

We listen carefully to the opinions and feedback from our members, colleagues and event delegates as they are so vitally integral to the effectiveness and success of future GEO events. We have summarised the views of attendees that responded to the post-conference survey in this report so that they can be shared with your colleagues and clients.

We look forward to seeing you in London for GEO’s 16th Annual Conference on 15-17 April, 2015!

Danyle L. Anderson
EXECUTIVE DIRECTOR

Carine M. Schneider
CHAIR, BOARD OF DIRECTORS
Delegate Type
Attendees represented companies that offer equity compensation as part of their company’s compensation package in functions such as human resources, accounting, finance, tax and stock plan administration, and advisor or service providers to those companies.

54% of attendee companies were issuers and 42% advisor or service provider companies.

Origin
Attendees hailed from all corners of the globe.

More than 420 delegates from 22 countries attended: 68% from the US and 32% from the rest of the world.

Role
The conference attracted professionals from a variety of roles from a wide range of industry types and sizes.

70% of attendees were senior level professionals, including CEOs, CFOs, Directors, Partners or Heads of Department.

Note: ‘Senior Level’ is defined as someone in the role of Senior Manager or above
EDUCATIONAL SESSIONS

GEO’s 15th Annual Conference hosted leading international experts speaking about strategy, key issues and best practices in the fields of equity and executive compensation.

The program, developed by GEO under the guidance of leading industry experts and members of the Speaker Selection Committee of GEO’s Board of Directors, was designed to appeal to individuals located across the globe who are involved in the design and administration of employee share plans as well as the providers that serve them.

Three carefully selected keynote speaker slots featured experts in their fields of academia, business and government. In addition, more than 50 educational sessions were available to attendees, taught by international experts in the areas of share plan design, accounting and tax, legal and regulatory compliance, and program communication and administration.

POPULAR SESSIONS
based on attendance and survey feedback

- **KEY INTERNATIONAL UPDATES ON STEROIDS – YOUR CONNECTION DEVELOPMENTS AROUND THE GLOBE IN 60 MINUTES**
- **MAKING MOBILITY TAXATION LESS TAXING**
- **GRANTING EQUITY ABROAD: EMPLOYMENT LAW PITFALLS AND BEST PRACTICES**
- **EXCELLENCE IN ACTION: THE UNILEVER GLOBAL MOBILITY POLICY**
- **MANAGING PERCEPTION - THE REAL COST OF POOR COMMUNICATION**
- **TRENDS AND OBSERVATIONS FROM GEO GLOBAL EQUITY INSIGHTS 2014**
- **E-X-P-A-N-D-I-N-G THE HORIZONS OF YOUR GLOBAL ESPP**
- **ARE YOUR PLANS REACHING ALL YOUR EMPLOYEES – HOW INCLUSIVE AND DIVERSE ARE YOUR PARTICIPANTS?**
- **CONTRASTING APPROACHES TO GLOBAL OFFERINGS IN AUSTRALIA AND CHINA**
- **FROM DESIGN TO COMMUNICATIONS: THE INNER WORKINGS OF GLOBAL EQUITY COMPENSATION AT HP**
NETWORKING SESSIONS

Issuer Roundtable & Luncheon, Provider Council Meeting & Chapter Coordinators’ Lunch

Unique and memorable events designed for exclusive networking and discussions of greatest interest and concern to GEO supporters in open forums.

Opening Reception **Sponsored by Morgan Stanley**

The 15th Annual GEO Conference kicked off in style! The perfect opportunity to catch up with old colleagues and contacts, visit the exhibitors and make new acquaintances. Guests muddled their very own Mojitos and rolled authentic Cuban cigars, a fitting tribute to Miami’s rich Latin culture.

Speed Networking

A fun and unique professional meet and greet designed to quickly introduce and connect attendees: “speed dating” in a professional environment!

Nightcap Party **Sponsored by Morgan Stanley**

An after-dinner soirée with drinks and desserts for conference delegates.

2014 GEO Awards Gala & After Party **Sponsored by Fidelity Stock Plan Services**

The prestigious GEO Awards ceremony was held on the evening of 8th May and celebrated the achievements of the best in global equity compensation.
With so many high caliber entries this year, the competition was stronger than ever and we are thrilled to celebrate the tremendous achievement represented by all of this year’s submissions. GEO would like to warmly congratulate all award winners and recognize all those who took part for continuing to raise the bar for their employees around the world.”

DANYLE ANDERSON
EXECUTIVE DIRECTOR, GEO

THE 2014 GEO AWARDS Sponsored by Fidelity Stock Plan Services

Award honors were presented in ten categories, each designed to highlight excellence in key areas of the share plan industry such as communications, technology, innovative or creative plan design, plan effectiveness and financial education.

A record number of entries were received this year from a wide array of public and private companies of all sizes and from a variety of industries headquartered in ten different countries, employing as few as 1,000 employees to more than 300,000 employees and offering equity in as many as 190 countries.

Award winners were determined by an independent panel of industry veterans that included Chair Dennis Paalman (Royal Ahold NV, NL), James Stoudt (GSK, US), Peter Newhouse (Unilever, UK) and Jean Wong (Gilead Sciences, US). The panel members boast a cumulative 80 years’ experience in business and employee share plans, each with varying expertise to ensure that award submissions were evaluated with consideration of all appropriate elements.

THE WINNERS

Best Plan Effectiveness
State Street Corporation
(25,000-75,000 Employees)
AmaDeus IT Holding, S.A.
(10,000-25,000 Employees)

Best Use of Technology
General Electric
(over 125,000 Employees)
Amazon.com Inc.
(75,000-125,000 Employees)

Most Innovative and Creative Plan Design
Royal Dutch Shell plc
(75,000-125,000 Employees)
Kinross Gold Corporation
(under 10,000 Employees)

Best Plan Communication
Siemens
(over 125,000 Employees)
Rio Tinto
(25,000-125,000 Employees)
Pearson plc
(10,000-25,000 Employees)

Best in Financial Education
Baker Hughes
(25,000-75,000 Employees)
Riverbed Technology, Inc.
(under 10,000 Employees)

Best Use of Video Communications
Rio Tinto

Most Creative Solution
Technicolor
(10,000-25,000 Employees)
Kofax Limited
(under 10,000 Employees)

Best Use of an Employee Share Plan in a Corporate Action
Nokia
(75,000-125,000 Employees)
Merlin Entertainments
(10,000-25,000 Employees)

The Judges’ Award
Mary Ann Beyster
President of the Foundation for Enterprise Development

For further information, category descriptions and a full list of winners, please visit: www.globalequity.org/geo/geoawards.
ATTENDEE HIGHLIGHTS

GEO does a great job of bringing a diverse group of topics and presenters together for a very valuable conference.

Loved all the CPE!

Country specific is great!

I love that the materials weren't distributed at each session but available electronically.

Again, the best conference in the industry.

Beautiful location.

The venue was lovely, and I was very impressed with the professionalism of the hotel and conference organisers, it ran brilliantly smooth and the food was excellent.

As always, excellent conference and such a great opportunity to hear from colleagues from around the world vs. a US only perspective. Well done!

The Issuer Lunch is my favorite part of the Annual Conference! It's always so nice to be able to visit and catch up with everyone before we all get busy.

I think it is SO great that audio recordings are being made available for sessions I wasn't able to attend.

Relaxed way to meet your peers.

The awards are an excellent recognition of all the work done in our industry.

Fantastic GEO team.
THE CONFERENCE IN PICTURES
ACCESS CONFERENCE RESOURCES ONLINE

Follow the links below to access GEO’s 15th Annual Conference resources:

- Presentation materials – http://www.globalequity.org/geo/miami2014-cybercafe
- Session audio recordings - http://www.globalequity.org/geo/Miami2014_recording
- Event photography – http://www.globalequity.org/geo/2014photos

Note: Conference materials are only available to GEO Members. Web login is required.

THE LAUNCH OF A NEW GEO MEMBER BENEFIT

Launched at GEO’s 15th Annual Conference, GEOconnect, the new GEO member-only online community, launched during GEO’s 15th Annual Conference in Miami and allows you to interact with GEO members around the world wherever and whenever you need to. GEOconnect is a private and secure community forum where GEO members are able to:

* CONNECT and communicate with fellow members
* PARTICIPATE in focused discussion groups
* ACCESS useful and informative document libraries
* NETWORK via a comprehensive member directory
* CONTRIBUTE to member blogs and create your own
* SHARE files and post questions online

GEOconnect members have the flexibility to receive discussions and postings directly to their inbox; controlling what they’d like to see and how often. Members can choose to be notified of topics important to them and ensure that all relevant discussion threads reach them in a timely manner.

We know the value that GEO members put on the networking and educational opportunities we provide through our conferences and programs throughout the year. GEOconnect will build on that value. We are thrilled to enter into this new phase of member communications, and look forward to your participation in this exclusive and valuable community.

Less than a month after launch, GEOconnect already boasts more than 100 posts and 670 connections within five active communities.

Join the conversation today!
2014 GEO ANNUAL CONFERENCE SPONSORS

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SAVE THE DATE

2015 Annual GEO Conference
15 April - 17 April

LONDON

To find out more about future events, contact GEO at GEOinfo@globalequity.org or visit www.globalequity.org