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<tr>
<td>7:00</td>
<td>Guided Jogging Tour of Amsterdam <em>(optional, pre-registration required)</em></td>
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<td>8:00</td>
<td>Registration Hours</td>
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<tr>
<td>8:15</td>
<td><strong>Inaugural Fellows Breakfast</strong> <em>(invitation required)</em></td>
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<tr>
<td>10:00</td>
<td><strong>Issuer Advisory Council Meeting</strong></td>
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<td>11:00</td>
<td>Room Transition</td>
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<tr>
<td>11:15</td>
<td><strong>Issuer Roundtable and Luncheon</strong> <em>(open to all Issuers)</em></td>
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<td>12:45</td>
<td>Room Transition</td>
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<tr>
<td>13:00</td>
<td><strong>Opening Remarks</strong></td>
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<tr>
<td>13:25</td>
<td>Keynote I—Beyond Ownership <strong>BUSINESS INTELLIGENCE</strong></td>
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<td>14:15</td>
<td>Room Transition</td>
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<tr>
<td>14:30</td>
<td><strong>Breakout Series I</strong></td>
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<tr>
<td>14:30</td>
<td>1.1 Pull up a Chair: Getting a Seat at the Table <strong>BUSINESS INTELLIGENCE</strong></td>
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<td>14:30</td>
<td>1.2 Asia Awakening: Watch out for the Crouching Tigers and Furious Dragons! <strong>DESIGN AND STRATEGY</strong></td>
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<td>1.3 Riding the Big Data Wave: Using Data and Analytics to Get More from Your Share Plans <strong>TRENDING NOW</strong></td>
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<td>1.4 Going Live with Style! Communicating Change to Equity Plan Participants Worldwide <strong>COMMUNICATIONS</strong></td>
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<td>1.5 Brave New World—Global Updates You Need to Know Now <strong>COMPLIANCE &amp; REGULATORY</strong></td>
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<td>14:30</td>
<td>1.7 Back-to-School: 2019 Share Plan Research <strong>DESIGN AND STRATEGY</strong></td>
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<tr>
<td>15:20</td>
<td>Open Time</td>
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<tr>
<td>16:00</td>
<td><strong>Opening Networking Reception</strong> <em>This event is open to guests of registered attendees for an additional fee, please register your guests (guest fee applies).</em></td>
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<td>16:00</td>
<td><strong>Sponsored by:</strong> Morgan Stanley</td>
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<tr>
<td>18:00</td>
<td><strong>Departure for Rijksmusem via Canal Boats</strong></td>
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</table>
19:00 — 22:00 **Exclusive Private Event of All the Rembrandts Special Collection Exhibition at the Rijksmuseum**  
*This event is open to guests of registered attendees for an additional fee, please register your guests (guest fee applies).*

22:00 — 23:00 Departures for Krasnapolsky

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<tr>
<td>7:00 — 8:00</td>
<td>Guided Jogging Tour of Amsterdam <em>(optional, pre-registration required)</em></td>
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<td>8:00 — 17:00</td>
<td>Registration Hours</td>
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<tr>
<td>8:00 — 9:00</td>
<td>Breakfast</td>
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<tr>
<td>8:00 — 9:00</td>
<td><strong>New Attendee Breakfast</strong> <em>(first time conference attendees only)</em></td>
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<tr>
<td>9:15 — 9:25</td>
<td>Welcome Remarks</td>
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<tr>
<td>10:25 — 11:00</td>
<td>Morning Networking Break</td>
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<tr>
<td>11:00 — 11:50</td>
<td><strong>Breakout Series II</strong></td>
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<tr>
<td>2.1</td>
<td>Seven Simple Techniques to Build Share Ownership at Your Company COMMUNICATIONS</td>
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<tr>
<td>2.2</td>
<td>Navigating the Global M&amp;A Minefield COMPLIANCE &amp; REGULATORY</td>
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<td>2.3</td>
<td>Launching a Global Share Plan—the Infosys Story PROGRAM MANAGEMENT</td>
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<td>One Size May NOT Fit All: Finding a Grant Sizing Strategy That Fits Just Right TRENDING NOW</td>
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<td>2.5</td>
<td>GDPR (Almost) One Year Later—Lessons Learned and Strategies Scuttled COMPLIANCE &amp; REGULATORY</td>
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<tr>
<td>2.6</td>
<td>Stop Talking and Start Communicating—Effective Global Tax Communication COMMUNICATIONS Available via Live Broadcast</td>
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<tr>
<td>11:50 — 13:00</td>
<td>Networking Lunch</td>
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</table>
Thursday, 11 April 2019 (continued)

13:00 — 13:50 **Breakout Series III**

3.1 Exploring Differences between US and International Stock-Based Accounting Standards **FINANCE, TAX & ACCOUNTING**

3.2 IPO and Its Impact on Employee Equity Programs **DESIGN AND STRATEGY**

3.3 Preparing for the EU Shareholders' Rights Directive: The Time Is Now! **EXECUTIVE PAY**

3.4 Diversity—Strategic Priority or Compliance? **COMPLIANCE & REGULATORY**

Available via Live Broadcast

3.5 The Doctor Is in: Preventative Tests for Healthy Equity Programs **PROGRAM MANAGEMENT**

3.6 Total Rewards for a Flexible Future **DESIGN AND STRATEGY**

13:50 — 14:10 Room Transition

14:10 — 15:00 **Partner Alliance Council Meeting**

14:10 — 15:00 **Breakout Series IV**

4.1 Equitable Equity—Does It Really Work? **DESIGN AND STRATEGY**

4.2 What’s the Deal?! Strategies for Managing Employee Expectations During a Transaction **TRENDING NOW**

4.3 Tilting at Windmills and Giants (and How to Know the Difference)—the Latest Key Developments in Global Share Plans **COMPLIANCE & REGULATORY**

Available via Live Broadcast

4.4 The Sky’s the Limit—Share Price Challenges and Your Equity Plans **PROGRAM MANAGEMENT**

4.5 Extreme Makeover Live—Performance Award Communications Edition **TRENDING NOW**

4.6 Global Equity Insights Survey 2019—Looking Back to the Future **DESIGN AND STRATEGY**

15:00 — 15:30 Afternoon Networking Break
Thursday, 11 April 2019 (continued)

15:30 — 16:20 **Breakout Series V**

5.1 Share Plans in Israel—Thinking Big in a Details World  **FINANCE, TAX & ACCOUNTING**
5.2 Straight Talk from the Next Generation  **DESIGN AND STRATEGY**
5.3 Transforming Equity Compliance for Mobile Employees  **COMMUNICATIONS**
5.4 Best in Breed or Global Harmonization? Finding the Right Share Purchase Plan for Your Company  **DESIGN AND STRATEGY Available via Live Broadcast**
5.5 The Trek to IPO: Reaching the Summit  **PROGRAM MANAGEMENT**
5.6 Telling Your Equity Plan Story Through Data Visualization  **TRENDING NOW**

16:20 — 16:40 Room Transition

16:40 — 17:30 **Breakout Series VI**

6.1 Staying Ahead of the Curve—Let's Play GEO Jeopardy!  **PROGRAM MANAGEMENT**
6.2 RESPECT! The Global Compliance Balancing Act—Identifying Your Risk Tolerance  **COMPLIANCE & REGULATORY**
6.3 Are French-Qualified Plans "Plus Chics"?  **DESIGN AND STRATEGY**
6.4 ‘Til Death Do Us Part: Marrying Equity and Mobility  **FINANCE, TAX & ACCOUNTING Available via Live Broadcast**
6.5 Into the Wild: Taking Your Local Share Plan Global  **PROGRAM MANAGEMENT**
6.6 Tips from the Masters—How Creativity Drives Global Share Plan Success  **COMMUNICATIONS**

18:30 — 21:30 **GEO Awards Gala Dinner and Awards Presentations**

*This event is open to guests of registered attendees for an additional fee, please register your guests (guest fee applies).*

Sponsored by: Fidelity

21:30 — 23:30 **GEO Awards After Party Celebration**
# GEO's 20th Annual Conference

**Agenda by Time**

## Friday, 12 April 2019

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<tr>
<th>Time</th>
<th>Activity</th>
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<tr>
<td>7:00 —</td>
<td>8:00 Guided Jogging Tour of Amsterdam <em>(optional, pre-registration required)</em></td>
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<td>13:30 Registration Hours</td>
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<td>8:30 —</td>
<td>9:00 Breakfast</td>
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<td>9:00 —</td>
<td>9:30 <strong>Friday Kickoff</strong></td>
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<td>9:30 —</td>
<td>9:40 Room Transition</td>
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<td>9:40 —</td>
<td>10:30 <strong>Breakout Series VII</strong></td>
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<td></td>
<td>7.1 Smart Practices for Workflow Automation <strong>PROGRAM MANAGEMENT</strong></td>
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<td><em>Available via Live Broadcast</em></td>
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<td>7.2 Buckle Up—Navigating the Road to Implementing Your Global Tax Policy <strong>FINANCE, TAX &amp; ACCOUNTING</strong></td>
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<td>7.3 Three Simple Steps to Engaging Your Employees <strong>COMMUNICATIONS</strong></td>
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<td>7.4 &quot;Oops!...I Did It Again&quot;—Discretions, Amendments and Mistakes <strong>COMPLIANCE &amp; REGULATORY</strong></td>
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<td>7.5 Project Lifecycle: The Share Plan Journey from Pre-IPO and Beyond! <strong>DESIGN AND STRATEGY</strong></td>
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<td>7.6 Growing Pains: Managing Explosive Growth While Maintaining an Ownership Culture <strong>PROGRAM MANAGEMENT</strong></td>
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<tr>
<td>10:30 —</td>
<td>11:10 Morning Networking Break</td>
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<tr>
<td>11:10 —</td>
<td>12:00 <strong>Chapter Coordinators Meeting</strong> <em>(open to all chapter coordinators)</em></td>
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<td>11:10 —</td>
<td>12:00 <strong>Breakout Series VIII</strong></td>
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<td>8.1 Skyscanner’s High-Flying Share Plan Success Story <strong>DESIGN AND STRATEGY</strong></td>
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<td>8.2 Measuring the Impact of Employee Equity Plans on Employee Engagement <strong>EXECUTIVE PAY</strong></td>
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<td>8.3 The “Why” Meets the “How”: Deciphering the World of Global Share Plan Strategy <strong>DESIGN AND STRATEGY</strong> <em>Available via Live Broadcast</em></td>
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<td>8.4 Implementing an Employee Stock Portal the Amazon Way <strong>PROGRAM MANAGEMENT</strong></td>
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<td>8.5 The Strategy and Practice of Relative TSR Around the Globe <strong>TRENDING NOW</strong></td>
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<tr>
<td>12:00 —</td>
<td>13:30 <strong>Closing Keynote Luncheon—A Piece of the Action</strong> <strong>BUSINESS INTELLIGENCE</strong></td>
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<td><em>Available via Live Broadcast</em></td>
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<tr>
<td>13:30 —</td>
<td>Closing and Prize Drawings</td>
</tr>
<tr>
<td>16:00 —</td>
<td>18:30 <strong>Heineken Experience VIP Tour</strong> <em>(optional, payment and pre-registration required)</em></td>
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</tbody>
</table>
Keynote Addresses

**Keynote I—Beyond Ownership**

**BUSINESS INTELLIGENCE**

Share ownership is a powerful motivator; even companies that don’t practice it want their employees to “think like an owner”. But shares are the beginning of motivation, not the end. What else should companies do to build a workforce that is sustainably committed, collaborative and creative? We used to believe that so-called scientific management, with its toolbox of job descriptions, KPIs, targets and measurements of all kinds were the answer. But with just 15% of the world’s workforce feeling highly engaged in their work, clearly we need better answers now. In this session, Margaret Heffernan, former CEO and author of five books, largely exploring business and effective leadership, will explore the roots of motivation and commitment at work, what characterises highly productive innovative business and the very big impact that small changes can make to the world of work. *Available via Live Broadcast*

_Danye Anderson, Global Equity Organization (US)_  
_Margaret Heffernan, Former CEO, Author, Keynote Speaker (UK)_

**CPE Credit: 1.0**
Field of Study: Personal Development
Level: I, II, III

**Keynote II—Finding Opportunities in a World of Financial, Economic and Political Upheaval**

**BUSINESS INTELLIGENCE**

Over the recent course of history, we have seen some major global shifts. From extreme political upheaval and trade tensions—both threatened and executed—to existential threats to key institutions like the European Union. All of this has meant ambiguity for global economics and the financial markets. So, what does the future look like?

In this timely discussion, Tom Stevenson, Investment Director at Fidelity, assesses the challenge of navigating through a period of unprecedented uncertainty. His analysis reveals a rising tide of populist politics and trade disputes colliding with the reversal of ten years of monetary and fiscal stimulus to create a fragile environment. Investors have never enjoyed the luxury of foresight but over the years they have been rewarded for optimism. Stevenson makes the case for keeping the faith through the prevailing market storms. Join the session to get an overview of the GEO-political landscape in 2019 and what this means for you and your share plans! *Available via Live Broadcast*

_Danye Anderson, Global Equity Organization (US)_  
_Tom Stevenson, Fidelity International (UK)_

**CPE Credit: 1.0**
Field of Study: Economics
Level: I, II, III
Keynote III—A Piece of the Action

BUSINESS INTELLIGENCE

The world’s first shares of stock were issued in the city of Amsterdam on April 1, 1602. In fact, the first trades took place in a private home just steps from where the Hotel Krasnapolsky now stands. Within the next few days, 1,143 individuals had purchased pieces of paper saying they were partial owners of a new kind of corporation. The Dutch East India Company changed the world in many ways, not the least of which was in issuing stock. With that innovation, the citizens of Amsterdam, ordinary bakers and maids as well as powerful merchants, were able to get "a piece of the action" in one of the greatest economic booms in history: they became active participants in the Dutch Golden Age, which sent ships around the globe, setting off revolutions in commerce and culture. Join Russell Shorto, author, historian and journalist, as he uses this moment in time as a fulcrum to examine the miraculous rise of the Dutch Republic in the 17th century and to explore its remarkable influence on the modern world. Available via Live Broadcast

Russell Shorto, Author, Historian and Journalist (US)

CPE Credit: 1.0
Field of Study: Personal Development
Level: I, II, III

Breakout Series I

1.1 Pull up a Chair: Getting a Seat at the Table

BUSINESS INTELLIGENCE

How do senior compensation experts build their brand in their firm or in their industry? This session will show you how to master just FOUR easy steps that will help you grow your career! Attendees will receive important advice including details such as: (1) Know your stakeholders: understand their culture, priorities and business goals; (2) Build relationships: develop strategic partnerships, internally and externally; (3) Become the subject matter expert: utilize available resources to expand your knowledge and experience to establish your reputation as a subject matter expert; and (4) Share your knowledge: confidently participating in the decision-making process. You too can easily and seamlessly build your brand with these four easy steps, successfully advocating for yourself, your team and your company in no time! Join this session as industry experts share their secrets to career success!

Kelly Geerts, E*TRADE Corporate Services (US)
Dennis Lanham, Leavey School of Business, Santa Clara University (US)
Carine Schneider, AST Private Market (US)
Jessica Vinsand, SAP (DE)

CPE Credit: 1.0
Field of Study: Personal Development
Level: I, II, III
1.2 Asia Awakening: Watch out for the Crouching Tigers and Furious Dragons!

DESIGN AND STRATEGY

As Asia continues to grow, major changes in local tax, immigration, securities and foreign exchange control regulations have taken place just in the past 12 months with a direct and indirect impact on compensation, share plans and workforce mobility. The Asia Tigers and Dragons have taken proactive compliance measures in multiple disciplines: China’s latest Individual Income Tax (IIT) reform and changes in immigration law; Australia’s latest trend in non-traditional STI/LTI and new regulation for senior management in financial services; Singapore’s amended labor policy in employee categorization and taxable equity compensation income reporting challenges in India cluster countries. All have significant impacts on the companies’ policies, governance and process designs. This panel will highlight the recent changes and how these changes impact the current share plan environment. If you do not want to be caught by the tigers and dragons, join the panel and discover ways to combat the beasts!

Sarah Clark, Solium (HK)
Adie Leung, Citigroup, Inc. (HK)
Joanna Mak, Brambles Limited (AU)
Chi-Ling Wong, BNY Mellon (HK)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: II, III

1.3 Riding the Big Data Wave: Using Data and Analytics to Get More from Your Share Plans

TRENDING NOW

In an effort to streamline processes and better understand outcomes, technological advances and the study of big data have popped up in almost all industries. It is time this approach hit your global equity plan too—join this panel of experts to see how data and analysis can transform your plan! Learn about the current landscape of Long-Term Incentive plans and the evolution of the designs we see today, and see what LTI designs are effective for shareholders and which are effective for employees, and if anything exists in the middle. And with a crash course in data analytics, attendees will experience a variety of topics, including a comparison between cash and equity and an analysis of “cost” versus “value” over many types of equity awards, from stock options to performance awards. At the end of this session, you will be armed with ideas and statistics to help you get more out of your plans.

Dan Kapinos, Aon Equity Services (US)
Miguel Navarro Fron, Telefónica (ES)
Thomas Paleka, Gallagher (US)
Carl Stegman, Fidelity (US)

CPE Credit: 1.0
1.4 Going Live with Style! Communicating Change to Equity Plan Participants Worldwide

COMMUNICATIONS

Everyone knows that change is never easy. Join this unique case study session and explore how International Paper conquered the “change” challenge head-on and successfully relaunched and reenergized their company’s share plans. Putting the participant at the forefront of importance in their transition strategy, the International Paper team entered every stage of the launch process from their participant’s perspective. From carefully crafted communications delivered in various mediums that were multi-faceted and globally sensitive, to in-person meetings, IP and their partners executed a dynamic “Go Live” campaign that did more than just communicate the necessary information. Instead they delivered excellent employee communications in a condensed time-frame, and focused on generating excitement and employee engagement for their global stock plan participants. This session will tell one company’s story of effective transition, address the challenges of change management, and share best practices and experiences. Come hear their inspiring story and take away some lessons learned for your future reference!

*Allison McBride, International Paper (US)*  
*Beth Murphree, International Paper (US)*  
*Maria Robins, Morgan Stanley (US)*  
*Sean Trotman, Deloitte (US)*

CPE Credit: 1.0

Field of Study: Communications and Marketing  
Level: I, II, III

1.5 Brave New World—Global Updates You Need to Know Now

COMPLIANCE & REGULATORY

Join this panel of share plan experts for a trip around the world of global stock plan regulatory challenges, and get up-to-the-moment updates on the equity compensation hot spots such as SAFE in China, PAYE in France, the overhaul of the tax regimes in Belgium and China. As a bonus, attendees will be treated to a lively discussion of the impact of Brexit on share plans, while considering further global changes including the EUPR, and other securities law, foreign exchange and tax updates. This interactive session will be sure to engage you while providing you with tips and tricks on the topics covered to help you identify and combat your problem areas head-on. Come and hear the latest developments in the world’s equity hotspots!

*Mathew Hunter, Tapestry Compliance (UK)*  
*Meera Mistry, Ascential plc (UK)*  
*Hannah Needle, Tapestry Compliance (UK)*  
*Claire Sykes, Rolls-Royce (UK)*
1.6 The (Equity Plan) Choices are IN. What Have We Learned?

DESIGN AND STRATEGY

The choices are in. What have we learned? Join this panel of experts as they discuss equity compensation Choice programs—one of the hottest emerging trends in the industry. Attendees will hear the details of why these companies decided to offer a global Choice plan and the panelists will share their practical advice on how to make these programs successful as well as what traps to avoid. Using data visualization, session attendees will be able to see what the data shows and learn about the communication and education programs designed to engage participants and enable them to understand the program. You have a choice to attend this session and learn more about equity choice programs, join in and find out how these programs work and what award types employees are choosing and why. Available via Live Broadcast

Cheryl Bierwagen, Nike, Inc. (US)
Salim Damani, Novartis International AG (CH)
Emma Domingo, Zillow Group, Inc. (US)
Keith Morgan, Moss Adams (US)
Barbara Wallace, Consultant (US)

1.7 Back-to-School: 2019 Share Plan Research

DESIGN AND STRATEGY

Join members of GEO’s Academic and Government Council for an enlightening dialogue on the current landscape of academic research in share plans around the globe. Hear the panel of top academics in our field discuss how companies have successfully used academic research in support of share plan strategy or to solve a specific business problem or challenge. Attendees will also learn why it is important to have academic research on share plans, the challenges our academic community encounters in their research, and how members of our share plan community can take part to maximize the value of current research and translate these important findings into improvements in your own companies.

Bill Castellano, Rutgers Center for Employee Ownership (US)
Don-Tobias Jol, Baker McKenzie (NL)
Paige Ouimet, University of North Carolina, Kenan-Flagler Business School (US)
Michael Wolff, University of Göttingen (DE)
Breakout Series II

2.1 Seven Simple Techniques to Build Share Ownership at Your Company

COMMUNICATIONS

How is participation in your stock purchase program? If the answer is something other than good or great, it might be time to reassess or fine-tune your education initiatives. This session will outline ways to turbocharge your education, whether you are hoping to increase enrollment in your plan, renew interest in it or inject some newness into your communications campaign. Our panel will walk through tips on plan design and employee communications that are simple, actionable items you can implement right away to improve the return on your investment and create more employee share ownership. Find out how to go from anemic to turbocharged participation in no time!

David Edwards, RBS (UK)
Nadine Franczyk, Amyris (US)
Robyn Shutak, Computershare (US)
Pat Sims, PJS Consultancy Services Limited (UK)
Elizabeth Stoudt, Aon Equity Services (US)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: I, II, III

2.2 Navigating the Global M&A Minefield

COMPLIANCE & REGULATORY

This session will outline some of the most significant challenges our panelists have faced when dealing with global equity plans in the context of mergers and acquisitions. They will share the solutions they reached for these challenges and the implications that these had for the parties and the affected employees. This discussion will also compare and contrast the differing approaches taken on either side of the Atlantic in both the public and the private company context. Included will be the outlining of key drivers, including securities laws, shareholder expectations, employment law (including notification and consultation requirements) and corporate and employment tax. Join us for an exciting look at the world of M&A from both sides of the Atlantic!

Terra Castaldi, Uber Technologies Inc. (US)
Nicholas Greenacre, White & Case LLP (UK)
Henrik Patel, White & Case LLP (US)

CPE Credit: 1.0
Field of Study: Business Law
Level: II, III
2.3 Launching a Global Share Plan—the Infosys Story

PROGRAM MANAGEMENT

After a break of more than a decade, Infosys revived its share plans with a BANG by creating the largest and most complex Stock Incentive Rewards program in the Indian technology industry, offering seven different types of equity instruments and covering over 8,000 employees, located in more than 40 countries. Attendees to this session will hear how Infosys examined its challenges and strategically collaborated to develop a plan that addresses the diverse needs of its employees as well as addresses the administrative, communications, tax and other regulatory requirements necessary for a successful program. Come hear how this Indian technology company dramatically impacted its culture on its journey from no plan to a robust global share plan in over 40 countries!

Shamita Chatterjee, Infosys Limited (IN)
Harshu Ghate, ESOP Direct (IN)
Superna Shanker, Infosys Limited (IN)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: I, II

2.4 One Size May NOT Fit All: Finding a Grant Sizing Strategy That Fits Just Right

TRENDING NOW

Equity compensation is a critical component of an effective total rewards strategy, but grant sizing is a little bit art, and a little bit science! A top-down or bottom-up approach to determining your grant pool is just the starting place. And, adjusting grant guidelines for multiple jurisdictions may require just as much localization as other benefits programs, from applying the same grant sizes regardless of location, to a unique strategy for each jurisdiction, to a regional rather than country-specific approach. Join this case study panel to understand how companies approach pool determination, benchmarking, key sources of information, the impact of tax and risk considerations that impact your granting, challenges with different approaches, and the frequency of revisiting Gallagher’s 18 country grant strategy, Brambles’ 40 country plan, and Hilton's 103 country approach.

Emily Cervino, Fidelity (US)
Cherie Curry, Hilton Worldwide Holdings Inc. (US)
Joanna Mak, Brambles Limited (AU)
Thomas Paleka, Gallagher (US)
Robert Purser, PwC (US)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: II, III
2.5 GDPR (Almost) One Year Later—Lessons Learned and Strategies Scuttled

COMPLIANCE & REGULATORY

GDPR introduced stricter requirements and higher penalties for violations, so it is important for companies to review their data privacy compliance not just with respect to customers, but with respect to employees’ participation in equity plans. Specifically, companies need to review the process and transfer of employees’ personal data within the company group and to outside providers. This panel examines the different bases that companies have been relying on and the advantages and disadvantages of each. In particular, the panelists will cover a high-level summary of GDPR and other new data privacy rules along with an overview of different approaches to data privacy compliance when offering equity awards under a parent company share plan to employees around the world, and practical strategies for complying with data privacy restrictions in the employment and equity context. Find out what you can do better to protect your employees’ private information!

Mark Casper, Maxim Integrated (US)
Jeremy Edwards, Baker McKenzie (UK)
Barbara Klementz, Baker McKenzie (US)
Nicole Sloane, Kimberly-Clark Corporation (US)

CPE Credit: 1.0
Field of Study: Business Law
Level: I, II, III

2.6 Stop Talking and Start Communicating—Effective Global Tax Communication

COMMUNICATIONS

Keeping track of your global employees is hard enough, but throw in the task of ensuring they have access to the right tax information at the right time and the complexities become tenfold. This session aims to tackle this issue as this panel of experts from around the world delve into different perspectives and practices for keeping your global population up to date and ensuring they know the impact of taxes on their equity compensation. Attendees to this session will hear key information on pertinent topics such as the necessary communications strategy, channels and output technologies used to facilitate communication, and recommendations for the best process to identify what works and what doesn't for your company. Communication is the key to maximizing the benefits of your company’s share plans—attend this session for a detailed look at how you can improve your strategy today! Available via Live Broadcast

Elizabeth Crutchley, AstraZeneca (UK)
June Davenport, Solium (ES)
Simona Paduraru, Google (US)
Yana Peters, Nike, Inc. (NL)
Markus Seppälä, Actelion Pharmaceuticals Ltd. (CH)

CPE Credit: 1.0
Field of Study: Communications and Marketing
Breakout Series III

3.1 Exploring Differences between US and International Stock-Based Accounting Standards

FINANCE, TAX & ACCOUNTING

It is becoming increasingly common for corporate entities to face dual reporting requirements under US GAAP and IFRS. This imposes the potentially tricky task of maintaining two sets of books related to share-based payment arrangements. This panel of experts have been there and done that—having experienced the challenges companies encounter when navigating through the accounting and administrative complexities involved in dual reporting. Session attendees will learn the key differences in the standards and the operational and administrative traps that are likely to come with them. Throughout the presentation this experienced panel will share "war stories," lessons learned, and common pitfalls they have encountered, including a lively discussion of the challenges related to an ASC 718/IFRS 2 conversion required as a result of a corporate redomestication, merger, or other transaction. Join this unique session for an insightful look at the challenges of US and international-based accounting standards!

Garry Devine, Horizon Pharma plc (US)
Desislava Rosebrock, Actelion Pharmaceuticals Ltd. (CH)
Gregor Sapinsky, SAP (DE)
Ken Stoler, PwC (US)

CPE Credit: 1.0
Field of Study: Accounting
Level: II, III

3.2 IPO and Its Impact on Employee Equity Programs

DESIGN AND STRATEGY

Siemens Healthineers (formerly: Siemens Healthcare) is a leading global healthcare company with 2017 revenue of €13.7 billion and approximately 48,000 employees in over 70 countries. To lay the foundation for further growth in the healthcare market, Siemens Healthineers went public in March 2018. This session will showcase the Healthineers’ IPO journey and the different measures Siemens Healthineers took to establish its own unique ownership culture, starting against the backdrop of a robust ownership culture at Siemens AG. With a focused discussion around how a broad-based equity culture at Siemens Healthineers was thoughtfully crafted and implemented, this panel of experts will share their insights about the global rollout challenges they faced in implementing these equity programs. Join this unique case study discussion to learn how to build your own share ownership culture from the ground up!

Frank Juhre, Computershare (CH)
Marc Muntermann, Siemens AG (DE)
David Voggeser, hkp/// group (DE)
Dr. Dennis Weinhold, Novartis International AG (CH)
Michael Wolff, University of Göttingen (DE)
3.3 Preparing for the EU Shareholders' Rights Directive: The Time Is Now!

EXECUTIVE PAY

EU member states have to transpose the Shareholder Rights Directive (SRD II) into local law by the Summer 2019 and the European Commission has issued draft guidance for consultation on standardized presentation of remuneration reports. Designed to increase transparency and enhance long-term shareholder engagement, the directive includes “say on pay” provisions among others with votes on remuneration policy and remuneration reports. The ultimate effect of these new requirements is yet to be seen. Join this discussion for an update on SRD II and how companies should prepare for the enhanced disclosures and new voting regime, and discuss the draft guidance.

Anne-Sophie Blouin, Willis Towers Watson (UK)
Damian Carnell, Willis Towers Watson (UK)
Jeremy Edwards, Baker McKenzie (UK)
Don-Tobias Jol, Baker McKenzie (NL)

3.4 Diversity—Strategic Priority or Compliance?

COMPLIANCE & REGULATORY

Do companies look at diversity in their workforce as a global strategic priority or a local compliance necessity? Join us for this timely session as the panelists look at why governments around the world are bringing in further equality regulation and what they expect to achieve with it. Companies like Unilever will address how they manage diversity globally and the impact of local regulations on global policies, and on the changing nature of work. The panel will discuss whether companies are setting diversity targets and whether these are attached to companies’ bonus and long-term incentive plans. There will also be a review of the impact on companies’ disclosures as well as discussion of the UK’s FRC recent report on diversity disclosures and expectations in the UK market. Additionally, there will be consideration of whether approaches to diversity is changing the way companies work and identification of key future developments in this area. Come see what this hot topic is all about! Available via Live Broadcast

Janet Cooper OBE, Tapestry Compliance (UK)
Margot Fransen, Unilever (NL)
Elysia McCaffrey, Government Equality Office (UK)
3.5 The Doctor Is in: Preventative Tests for Healthy Equity Programs

PROGRAM MANAGEMENT

You and your employees may experience symptoms that are signs of an unhealthy equity plan. Regular equity program checkups are as important for your share plans as they are for physical health, often revealing underlying issues in need of attention. In this session you will learn which tests to use for diagnosing common and often destructive problems, as well as learn the best practice treatment protocol for these problems. Meet our share plan “doctors,” learn how to deploy a regular checkup protocol that takes a preventative approach for healthy programs and leave equipped with a set of action items to help you increase the health of your plans!

Mark Clem, UBS Financial Services (US)
Wendy Jennings, Cisco Systems, Inc. (US)
Julie Vanderveen, UBS Financial Services (US)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: I, II, III

3.6 Total Rewards for a Flexible Future

DESIGN AND STRATEGY

As an industry, we spend most of our time focused on the challenges in front of us, on the details and daily effective management of our share plans. But to plan for the future, we need to take a step back and look at our wider reward strategy and examine how share plans form a part of a company’s overall success. Join this dynamic panel discussion to find out how some of the world’s largest international companies approach their total reward strategies to get the best from their employees. This session will focus on the key drivers of a total rewards strategy, design and execution, and panelists will share insights on what they are doing to enhance their company’s culture and performance. These experts will also share trends and best practices in the wider industry across different types of companies to give you a full view of how the landscape is changing. During the session you will have the opportunity to learn about these companies’ approaches, goals, actions, results and future plans to keep up with the moving tide of change for their workforces. Attendees will take away concepts from industry thought leaders that can be applied to any organisation.

Sian Halcrow-Wilson, Aon Equity Services (UK)
Laura Javurek Gill, Eaton Corporation (US)
Mitan Patel, Fidelity (UK)
Peter Newhouse, Unilever (UK)
Louise Sutton, Unilever (UK)

CPE Credit: 1.0
Field of Study: Personnel/HR
Breakout Series IV

4.1 Equitable Equity—Does It Really Work?

**DESIGN AND STRATEGY**

With a key strategy of transforming Allianz into a truly digital company, it was vital to the company’s success that all employees operate as ONE Allianz and execute simpler, faster and better for customers. The success of this transformation clearly depended on the commitment of each individual Allianz employee. To help drive the transformation strategy, the Company embraced share ownership as a key tool, deciding to allow all employees to participate in the company’s success—not only as employees, but also as shareholders. Previously, Allianz had offered country-specific share plans in only 22 countries and each country-specific plan had different features. This exciting transformation resulted in the replacement of the existing share plans with ONE truly global plan with harmonized conditions. This successful transition has reduced overall complexity as well as provided equal treatment amongst all employees. Come see how this innovative global company successfully used share ownership in support of its larger corporate strategies and transitioned its share plans from limited to all-encompassing!

*Anja Christl, Allianz SE (DE)*  
*Karoline Has, Computershare (ES)*  
*Daniela Kaestel, Allianz SE (DE)*  
*Katharina Mueller, Allianz SE (DE)*  
*Gordon Rösch, EY (DE)*

**CPE Credit: 1.0**
Field of Study: Personnel/HR  
Level: I, II, III

4.2 What’s the Deal?! Strategies for Managing Employee Expectations During a Transaction

**TRENDING NOW**

Merger, spin-off, acquisition, special dividend, go-private, IPO—the list goes on, but often a common theme remains. If you have been through an organizational life event you have probably heard employees say, “someone is getting rich in this deal, and it’s not me!” Corporate transactions do present many challenges, including specific challenges for employee share plan participants. Commonly share plan participants feel that they are somehow losing value or otherwise being treated unfairly with respect to any changes to their equity-based awards. Whether a cash-out, rollover, conversion, modification, substitution, forfeiture, or other change, you may find your plan participants approaching the deal with skepticism, and the resulting noise can be substantial. So be prepared by joining this session to hear strategies from experienced global multinational companies who will share how they proactively handled their employee experience, from managing employee expectations to delivering effective communications.
This session promises to be an exciting look at the world of M&A and to provide takeaways to help you ensure your next transaction has a positive “spin”!

Marie-Elise Darge, DWS Group GmbH & Co. KGaA (UK)
Anna Jex, Deloitte (UK)
Juliette McKay, Genpact (US)
Dolores Shook, PayPal Holdings Inc. (US)
Sandy Shurin, Deloitte (US)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: I, II

4.3 Tilting at Windmills and Giants (and How to Know the Difference)—the Latest Key Developments in Global Share Plans

COMPLIANCE & REGULATORY

This expert panel will address the most relevant legal, regulatory and tax updates impacting equity compensation in countries around the world as well as include a discussion of the practical solutions on how to respond to recent global equity developments from the panel’s issuer experts. Attendees will also hear updates on important trends in the equity industry along with a forecast of possible developments to come in the near future. As a share plan professional, this session will deliver what you need to know today to prepare for what’s to come. Join this not to be missed session for the most up-to-date information on global share plan regulatory developments around the world! Available via Live Broadcast

Mark Casper, Maxim Integrated (US)
Victor Flores, Baker McKenzie (US)
Christine Kim, AbbVie (US)
Aimee Soodan, Baker McKenzie (US)

CPE Credit: 1.0
Field of Study: Taxes
Level: I, II, III

4.4 The Sky’s the Limit—Share Price Challenges and Your Equity Plans

PROGRAM MANAGEMENT

Sky-high share prices can create unique challenges for the successful use of global share plans and this expert panel from companies that have experienced high share prices and the related ramifications, both strategically and administratively, are here to share them. Learn about the share plan challenges encountered as a result of high share prices: How do companies deal with eligibility as an all-employee share purchase plan may not be suitable for all employees in all countries? What type of instruments do companies use, particularly when matching shares might be too expensive? How can you attract, retain and motivate your key employees on a cost-effective basis? The practical challenges can be equally
daunting, and the panel will address topics including payroll deductions, sell-to-cover, fractional shares and payroll processes. Come hear this panel of professionals share their knowledge of best practices and lessons learned so you too can apply their suggestions to your equity programs.

Suvekshya Bhattarai, Booking Holdings (NL)
Kelly Geerts, E*TRADE Corporate Services (US)
Kimberly Hackman, Amazon (US)
Navjeet Rosenthal-Gill, PwC (NL)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: I, II, III

4.5 Extreme Makeover Live—Performance Award Communications Edition

TRENDING NOW

This session will take you on the journey of a communications makeover for a performance program that went from drab to fab overnight. And as a bonus, one lucky audience member, voted on by the audience, will get to participate in a live makeover process. See the transformation on paper and in video and watch the transformation of content live with a stock plan graphics expert making rapid work of a communications piece before your eyes. Even if you are not the lucky firm selected, you will get a template to use and create your own one-page infographic FAQ. The panel will also discuss analytics and feedback, in addition to other tips on communicating global performance plans. Join this session and you might be the lucky recipient of your very own communications makeover!

Caitlin Conklin, Aon Equity Services (US)
Roopali Hall, UGI Corporation (US)
John Hammond, Aon Equity Services (US)
Linda Vos, Royal Philips (NL)

CPE Credit: 1.0
Field of Study: Communications and Marketing
Level: I, II, III

4.6 Global Equity Insights Survey 2019—Looking Back to the Future

DESIGN AND STRATEGY

The Global Equity Insights Survey (GEIS) is a leading global assessment of current market practice and trends in equity compensation across the world. Now in its seventh year running, GEO is pleased to present the GEIS 2019 results, hot off the press! Findings of this year’s study will not only address the use of equity on a global level as a long-term incentive and broad-based tool, but will also address important topics such as plan types and design and will also cover deep insights into the communication and administration of equity plans and the impact of regulatory changes on both. Join us as we share the major survey findings from this year’s study as well as take a look at the evolution of findings since the
study’s inception. Our expert panel will come equipped to share how the study findings over the years should influence your HR and equity compensation strategies today and in the future.

Dr. Jan Dörrwächter, hkp/// group (DE)
Sheila Frierson, Computershare (US)
Fiona Montgomery, Fidelity (UK)
Marc Muntermann, Siemens AG (DE)
Sandra Sussman, SAP (US)
David Voggeser, hkp/// group (DE)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: I, II, III

Breakout Series V

5.1 Share Plans in Israel—Thinking Big in a Details World

FINANCE, TAX & ACCOUNTING

Israel, as the 'start-up nation' has become a center of interest to many global issuers. Whether you currently have share plan participants in Israel or are just thinking about it, this session is for you! Attendees will receive detailed information on the steps necessary to set-up a plan as well as information on the necessary ongoing administration when granting various awards in Israel. This group of specialists will also provide an overview of tax considerations and challenges under Section 102 for global issuer relocation. Join in for an exciting journey through Israel's equity landscape!

Yair Benjamini, Yair Benjamini Law Offices (IL)
Yael Elbaz Roiter, Teva Pharmaceuticals Industries Ltd. (IL)
Wendy Jennings, Cisco Systems, Inc. (US)
Odelia Pollak, ESOP – EXCELLENCE (IL)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: II, III

5.2 Straight Talk from the Next Generation

DESIGN AND STRATEGY

Developing your equity strategy requires your company to understand how various generations react to the design, administration, communication and structure of various types of equity plans. This session will allow attendees to hear directly from the "next generation" as they discuss how employees early in their careers are reacting to a variety of plan design elements such as vesting, timeframes, etc., as well as hear their preferences for communication and education tools, what is important to them in financial wellness discussions, administrative requirements that work or do not work, and the all-important privacy issues, including the use of social media. This unusual panel will give senior level practitioners a window into the
way your younger employees think—attend this session and hear this important information straight from “Next Gen” share plan professionals.

Lucy Anderson, Numis Securities (UK)
Charlotte Cooper, Stitch Communications (UK)
Jordan Dorich, Gallagher (US)
Carine Schneider, AST Private Market (US)
Charissa Schutte, Deloitte (NL)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: I, II, III

5.3 Transforming Equity Compliance for Mobile Employees

COMMUNICATIONS

This interactive session focuses on how Novartis transformed its historical approach to equity compliance for mobile employees, a path that culminated in winning a 2018 GEO award! With an unyielding commitment to Novartis’ values, striving for quality and focusing on performance in all aspects of compliance and a seamless associate experience, Novartis moved from an equity compliance process that was transactional to a true life-cycle approach. The panel will share why their approach had to change, how they went about doing so, and the results achieved to-date, enabled through the use of technology. Attendees will have the opportunity to understand the key drivers for Novartis’ journey and be asked to share their own experiences. Join this thought-provoking panel and learn how to transform your own mobility program!

Frank Juhre, Computershare (CH)
Vickram Paliwal, KPMG (CH)
Dr. Dennis Weinhold, Novartis International AG (CH)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: I, II, III

5.4 Best in Breed or Global Harmonization? Finding the Right Share Purchase Plan for Your Company

DESIGN AND STRATEGY

Broad-based employee share purchase plans are enjoying a resurgence of interest, but it is not always as easy to make this great idea into reality. The very first step in share purchase plan discovery work is deciding on the tax qualification status of your plan. Will you utilize a scheme that is tax qualified or nonqualified? This isn't always an easy answer. "Qualified" plans are unique to a particular jurisdiction, and it's typically not possible to offer the same plan provisions and tax qualification in multiple jurisdictions. If true global harmonization is the objective, a Nonqualified plan may be the only option. Taking a best-in-breed approach to offer tax qualification in multiple jurisdictions results in dramatically different employee plans, and a mix may favor only one jurisdiction. To learn more about how to approach
this challenge, join this panel of ESPP aficionados as they set out on a journey to explore various approaches to resolve this "qualification" conundrum. Available via Live Broadcast

Emily Cervino, Fidelity (US)
Cherie Curry, Hilton Worldwide, Inc. (US)
Sinead Kelly, Baker McKenzie (US)
Jennie Webb, Prudential (UK)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: I, II, III

5.5 The Trek to IPO: Reaching the Summit

PROGRAM MANAGEMENT

The IPO market has exploded and the number of companies listing to go public continues to increase. When is the best time to consider this crucial step in your company’s growth cycle and what are the key indicators that you are ready to take your company to the next level? Attendees will find out first-hand the key considerations of these panelist companies as well as the challenges they experienced when going from a private to a publicly-traded company and the impact of this journey on their share plans. Challenges to be discussed include the necessary restructuring of share plans, changing of vesting periods, communicating to shareholders, accounting for differing FX rates and addressing specific regulatory requirements created by entering the public realm in different markets. Join our expert panel and find out how they prepared for their IPO trek and reached the summit with success!

Lynette Jacobs, Pinsent Masons LLP (UK)
Katalin Kiss, Delivery Hero (DE)
Tim Luther, Delivery Hero (DE)
Iva Sonne, Solium (UK)
Richard Steele, Mind Gym (UK)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: I, II, III

5.6 Telling Your Equity Plan Story Through Data Visualization

TRENDING NOW

A picture paints a thousand words! In the world of big data, companies continue to invest in data visualization, or the visual representation of information, to empower their teams to efficiently and effectively make better decisions and share plan management is no exception. This growing trend has companies creating powerful visual dashboards of share plan information by extracting high-quality employee demographic, grant, expense, and tax data from equity recordkeeping platforms using a data visualization toolset and using these dashboards to then tell a meaningful story. Join this session to learn more about the growing data visualization trend. Hear how this tool can help simplify the messaging of complex share plan issues and how data visualization and dashboarding can help to improve a company’s approach to equity challenges. Attendees will see real examples of data visualization dashboards and
learn how to utilize visual representations to identify operational issues, communicate important monthly business reports, and generally how to “tell a story” using visualization techniques.

Jennifer Kirk, Google (US)
Matthew Mckittrick, Moss Adams (US)
Gregor Sapinsky, SAP (DE)
Barbara Wallace, Consultant (US)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: II, III

Breakout Series VI

6.1 Staying Ahead of the Curve—Let’s Play GEO Jeopardy!

PROGRAM MANAGEMENT

Join this lively and interactive session on the hottest global share plan topics today! This experienced panel will share their secrets on how they are handling certain corporate opportunities, challenges and topics that cross their desks daily and how they are staying ahead of the curve on these matters in this unique session format. Audience “contestants” will direct this session by providing their topic choices through live session polling—allowing you to hear more about the topics that are important to you! Topic choices presented will include focus areas across Executive Compensation, Equity Administration, Corporate Tax, Finance, IT and Automation, and HR Transformation. Looking for a session option to break the norm? Join GEO Jeopardy for a unique, energetic and interactive discussion!

Leann Balbona, KPMG LLP (US)
Kathi Greene, Phillips 66 Company (US)
Denise Ledbetter, MINDBODY, Inc. (US)
Margie Molesso, Walmart Inc. (US)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: I, II, III

6.2 RESPECT! The Global Compliance Balancing Act—Identifying Your Risk Tolerance

COMPLIANCE & REGULATORY

Operating global plans involves navigating a web of complex regulation. Issuers and their advisors are faced with tough judgement calls on a daily basis. Join this panel to hear a discussion on finding a commercial balance between complying with all global laws and taking a risk-based approach. The panel will explore what considerations companies take into account when making these decisions. Practical country examples of how issuers have approached these decisions, including in Japan, China, the USA, Guatemala, and more. What is changing and why we cannot just rely on the decisions we have made in previous years.
6.3 Are French-Qualified Plans "Plus Chics"?

**DESIGN AND STRATEGY**

If “be global, act local” is your motto regarding global long-term incentives, this is a must-attend session for you! The interest in qualifying plans in France has always been a subject of debate, often with a company’s head office on one side seeking the efficiency of a homogeneous global plan, and the French subsidiary on the other, with a focus on more competitive local arrangements, leaving little middle ground for negotiation. Come to this session to understand the issues at stake in this debate and hear the opposing testimonies of two large global companies, SAP and BMS (Bristol Myers Squibb), as well as brief and simple explanations regarding qualified versus non-qualified issues in France, and a discussion on the legal, tax and practical management challenges you should expect. As a special bonus, attendees will hear data from Banque Transatlantique’s benchmark study on 50 global companies running LTI plans in France. Don’t miss your opportunity to hear why French-qualified plans are “plus chics!”

*Franck Duez, Banque Transatlantique (FR)*  
*Mathieu Gonbert, Banque Transatlantique (FR)*  
*Sandra Sussman, SAP (US)*  
*Elisabeth Theret, Bristol-Myers Squibb (FR)*

**CPE Credit: 1.0**  
Field of Study: Business Law  
Level: I, II, III

6.4 ‘Til Death Do Us Part: Marrying Equity and Mobility

**FINANCE, TAX & ACCOUNTING**

When signing up for this conference, did you know that you would be attending a marriage counseling session? Do your mobility and equity programs need some help in taking the next step in their relationship? When mobility programs look to attain cross border equity compliance, companies face many challenges when pursuing an integrated approach to mobility and equity. Join this panel to examine the progression from non-compliance to establishing an end-to-end mobility compliance model. Attendees will be treated to a review of different approaches of mobility management based on where a company falls on the maturity model, a discussion of best practices for companies of various sizes and with varying budgets and a look at how an integrated approach can result in a better experience for both the employer and the employee. Marriage is not easy, and integrating your mobility and equity programs is not either. For a firsthand look at preventing global mobility issues, attend this counseling session and take the next steps in your mobility relationship! *Available via Live Broadcast*
6.5 Into the Wild: Taking Your Local Share Plan Global

PROGRAM MANAGEMENT

Join this panel on their journey away from Australian shores following the adventures of CSL Limited and Dulux Group as they offer their equity in over 20 locations across Europe, Asia and the Americas. Heads of Remuneration from CSL and Dulux will explain the philosophies which underpin their unique plans and how these have driven expansion across the globe. Exploring two very different plan designs, this session will trek through communication and administration challenges and navigate different measures of success to determine whether this wild adventure has really been worth it for CSL, Dulux and their employees!

Sue Benefield, DuluxGroup Ltd. (AU)
Micaela Costello, CSL Limited (US)
Michelle Kassis, PwC (AU)
Matthew Reed, Computershare (AU)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: I, II

6.6 Tips from the Masters—How Creativity Drives Global Share Plan Success

COMMUNICATIONS

This group of global share plan experts will delve into their reward landscapes and discuss the role creativity is playing in the success of their employee global share plans and rewards. With a combined population of over 150,000 employees, these panelists regularly face the challenges of communicating with diverse groups of employees in multiple countries, different levels of financial and technical literacy, languages and communication preferences. Their invaluable and honest insight will shine a light on these tricky challenges and how a creative approach to their communications has helped to overcome them. So, come along to find out how these masters of global share plans and reward have linked corporate strategy to employee experience, tackled employee engagement head-on, and achieved the results they need; driving long-term share ownership and increasing plan participation. What a difference a creative approach makes!

Amy Brimble, Stitch Communications (UK)
Jane Darlington, Stitch Communications (UK)
Julie Shepherd, Sage Group plc (UK)
Philip van Elsdingen, Interxion (NL)
Breakout Series VII

7.1 Smart Practices for Workflow Automation

PROGRAM MANAGEMENT

First this and then that...request a file from payroll, test and validate content, route reports to HR, and so on and so on. Think about the regular tasks in your job that require a sequence of events to get you from point A to point B. From creating year-to-date tax imports to managing more complex projects like payroll contributions for a global ESPP program, these tasks take time and are prone to human error. Ever wonder what you can do to make your workday more efficient? Creating efficiencies for the common processes you do every day is one of the single most beneficial things you can do for your company. If you are doing the same things over and over, stop and ask yourself if it is a good process or project to automate. Learn how to free up time, talent, and money in this smart and useful session. Available via Live Broadcast

Leann Balbona, KPMG LLP (US)
Veena Bhatia, Atlassian (US)
Robyn Shutak, Computershare (US)
Lena Annika Trick, F. Hoffmann-La Roche Ltd. (CH)

7.2 Buckle Up—Navigating the Road to Implementing Your Global Tax Policy

FINANCE, TAX & ACCOUNTING

You have probably heard that you need to have a solution for your mobile employees. But how exactly does a company get started? And how can a company possibly wrap its arms around such a big project? Attend this timely session to hear real stories from two multi-national companies on how they evaluated and implemented global tax solutions for their global and very mobile workforce. Attendees to this session will also hear tips and tricks to getting started and an overview of considerations every company should address while creating a global tax policy. Join this panel of experts as they go around the globe on mobility!

Ritu Aggarwal, Box (US)
Nicole Calabro, Baker McKenzie (US)
Greg Fox, Snap Inc. (US)
Megan Hunt, Charles Schwab (US)
7.3 Three Simple Steps to Engaging Your Employees

Employee engagement is the key to a successful share plan, but how do you really make this happen? Join our panel of share plan veterans to find out what the most important factors are in ensuring successful communication with your employees. This panel of seasoned experts, with award-winning communication strategies, will share their contrasting experiences driven by their different company goals, culture and budgets as well as share best practices and trends from their experiences working with companies of all types from across the industry. Join us to learn how different paths through the jungle of share plan communications can all lead to success!

Sophie Altaf, Fidelity (UK)
Jane Darlington, Stitch Communications (UK)
Laura Hammond, Amazon (US)
Meera Mistry, Ascential (UK)

7.4 "Oops!...I Did It Again”—Discretions, Amendments and Mistakes

Have you ever granted an award to the wrong person, or to the right person for the wrong value? Join our panel to discuss how you can practically deal with unexpected situations when unintentional errors catch you by surprise. Typically, the result of data inconsistencies or mixed internal messages, these pesky problems can, at a minimum ruin your day and have the potential to wreak havoc on your programs. This session will explore legal, administrative solutions including the surrender and cancellation of awards; the amendment of awards and terms; and how to best approach the use of internal discretions. Join this panel to hear how to fix that “oops” situation, after all, nobody’s perfect!

Sally Blanchflower, Tapestry Compliance (UK)
Hannah Needle, Tapestry Compliance (UK)
Elena Petrov, Aviva plc (UK)
Brian Purcell, Global Shares (UK)
Ita Shaughnessy, GAM Holding AG (UK)
7.5 Project Lifecycle: The Share Plan Journey from Pre-IPO and Beyond!

DESIGN AND STRATEGY

Join this unique case study panel as they explore the business lifecycle and related share plan strategy of two popular, Silicon Valley-based entities, Twitter and Hortonworks (recently merged with Cloudera). This panel will reflect on the evolution of the design and offering of their employee equity plans and how it has changed with their corresponding business events, from their pre-Initial Public Offering period and through the IPO, to the period of time immediately post-IPO and then on to five years later. Both Twitter and Hortonworks went public in 2014 and 2015 respectively and have both changed their equity plans extensively throughout this journey. Join this session to hear from the panelists on the considerations at each stage of the "life" of their companies and discover the secrets of the successful infancy to mature public company.

Jennifer George, PwC (US)
Nancy Kobs, Twitter (US)
Richard Morales, Cloudera (US)
Paul Randall, Hogan Lovells (UK)

CPE Credit: 1.0
Field of Study: Specialized Knowledge
Level: II, III

7.6 Growing Pains: Managing Explosive Growth While Maintaining an Ownership Culture

PROGRAM MANAGEMENT

Achieving company growth is a victory, but how do you grow while preserving the essence of what made you successful in the first place? Attendees of this unique session will hear about the challenges these fast-growing companies experienced in their transition from being a small start-up to a global organization. Hear about their unique journeys and specifically what they did to successfully scale their employee share plans to match their growth. Join this session to learn how growing companies managed explosive growth across the globe, while maintaining their strong ownership mindset and culture.

Angela Dawson, Shopify (CA)
Krista McBeth, Shopify (CA)
Frankie Williams, Farfetch (UK)
Jeremy Wright, Solium (US)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: I, II, III
8.1 Skyscanner’s High-Flying Share Plan Success Story

DESIGN AND STRATEGY

Achieving high levels of share plan participation can seem challenging at best, often times it can seem darn right unachievable. Not the case for the team at Skyscanner who launched a new plan in 2018 and achieved a staggering 84% participation rate! In 2016, following their takeover by Ctrip, a Chinese travel company, Skyscanner developed a share plan to create a new and effective incentive offering. The differences between Skyscanner’s incentives pre- and post-takeover were dramatic—including creative design features such as the unusual use of unlisted Skyscanner shares instead of the shares of the parent company, Ctrip, and an employee loan feature to assist with the share purchase with repayment made from payroll deductions, among others. Skyscanners thoughtful plan design, combined with their creativity, make for an exciting story as this panel shares the influences behind their changes as well as some of the challenges they faced. Join this session and be prepared to be inspired to take their out-of-the-box thinking back to your organization!

*Chris Fallon, Tapestry Compliance (UK)*  
*Jordan Levy, Tapestry Compliance (UK)*  
*Anne Oliver, Skyscanner (UK)*

CPE Credit: 1.0  
Field of Study: Personnel/HR  
Level: I, II

8.2 Measuring the Impact of Employee Equity Plans on Employee Engagement

EXECUTIVE PAY

Join this exciting look into measuring the impact of employee share plans on employee engagement. This panel will introduce the concepts surrounding employee engagement—from discussing how engagement can be classified to defining and measuring engagement, and with your participation, this session will take a deeper dive into what engagement should mean to you and your organization. Attendees will be asked to consider and discuss the role share-based awards play in effective employee engagement and will learn how engagement measures differ for broad-based to discretionary plans, how share plan awards can have a negative impact on engagement, how removing a share plan can affect employee engagement, and how employee equity plans can really unite a business.

*Hans de Jong, Ericsson (NL)*  
*Garry Harding, Computershare (UK)*  
*James Hayton, Warwick Business School, The University of Warwick (UK)*  
*Katrina McKay, Wood (UK)*  
*Polly McPhillips, SAP (DE)*

CPE Credit: 1.0  
Field of Study: Personnel/HR  
Level: II, III
8.3 The “Why” Meets the “How”: Deciphering the World of Global Share Plan Strategy

DESIGN AND STRATEGY

In a constantly evolving, increasingly complex business environment, with ever greater demands on organisations to provide a compelling employment proposition aligned to business objectives and strategy, it is important to occasionally pose the questions of “why?” and “how?” regarding our use of shares to compensate, incentivize and engage employees. This session will compare and contrast both the philosophy and practice between organisations from different geographies and industries and address topics such as the benefits of stock ownership and participation, workforce segmentation, “one size fits all” versus “think global, act local” approaches, the impact of equity compensation on engagement and performance, and the roles of companies and other stakeholders. Join this discussion and share your own views on the “why” and “how” of equity compensation! Available via Live Broadcast

Robert Head, Neo Reward Limited (UK)
Mark Higgins, WPP (UK)
Marc Muntermann, Siemens AG (DE)
Dennis Paalman, Signify (NL)
Barbara Waters, Aetna Inc. (US)

CPE Credit: 1.0
Field of Study: Personnel/HR
Level: II, III

8.4 Implementing an Employee Stock Portal the Amazon Way

PROGRAM MANAGEMENT

Today’s share plan participants want quick, complete access to their employee share plan information and a seamless way to view their data and make updates. Available tools to provide employees with the details they need to maximize the benefits of their plans include solutions such as broker-based web sites, consolidated benefits web pages, internal company web pages and custom-built solutions among others. The right choice for your company will depend on many factors. When Amazon decided to offer broker choice to their employees, an internal employee stock portal was the most efficient place to manage the employee choice as well as provide a consolidated view to the employee. Panelists for this session will discuss the design and implementation of the Amazon employee stock portal as an extension to Amazon’s GEO Award-winning Equity Management System. Come hear the details of this monumental project from start to finish, including a discussion of the project goals, the challenges the team encountered, and the solutions they creatively employed. Whether you want to explore industry best-practices or if you are interested in ideas around implementing your own employee stock portal, this panel will provide you tips and tricks, and things to consider before undertaking your own unique journey.

Jenna Knowles, Amazon (US)
Tim Oakes, Moss Adams (US)
Ryan Strong, Fidelity (US)
Keirstin Wright, Morgan Stanley (US)
8.5 The Strategy and Practice of Relative TSR Around the Globe

TRENDING NOW

Relative TSR remains one of the most popular performance metrics in the global marketplace, but plan design varies widely and it can be difficult to gather details on relative TSR plans because of incomplete or vague disclosures. Stop by this session and hear the history of relative TSR and why it has become the most popular performance metric in the marketplace and learn directly from these panelists, representing diverse geographies, why they implemented relative TSR, and how they balanced strategic and practical concerns to arrive at their current plan design. This session will also explore the relative TSR grant practices and plan design as reported in Aon's 2018 Global Relative TSR Survey, which captures the market practice of over 450 companies across the globe, detailing the prevalence of certain design features and grant practices, and how they differ between the US, UK and Europe. Attend this session and make your TSR metric a more useful tool!

Roopali Hall, UGI Corporation (US)
Christina Leung, Swiss Re (CH)
Michael Turner, Aon (UK)
CJ Van Ostenbridge, Aon Equity Services (US)