



GEO Membership

A Guide to Joining GEO's
Global Community





What's Included?

- ▶ **An Introduction to GEO** Page 3
 - ▶ About GEO
 - ▶ About GEO Members
- ▶ **Becoming a GEO Member** Page 4
 - ▶ Why Join GEO?
 - ▶ How to Join GEO
 - Membership Types and Fees
- ▶ **Member Benefits and Professional Development** Page 5
 - ▶ Resources and Services
 - Global Membership Base
 - Online and Offline Resources
 - GEOconnect
 - Mentor Match
 - Volunteer Program
 - ▶ Annual Global Conference and Events Program
 - ▶ The GEO Awards
 - ▶ GEO Chapters
- ▶ **Further Information** Page 8



"GEO's conferences focus on global companies and offer more content on plan design, both relevant to my work at SAP."

Jessica Vinsand, Equity Compensation Expert, SAP, United Kingdom



An Introduction to GEO

About GEO

The Global Equity Organization (GEO) was founded in 1999 to support corporate equity and executive compensation professionals dealing with the challenges of creating, managing and administering employee share plans large and small, national and global. GEO represents a community of nearly 5,000 individuals from companies and professional firms in more than 60 countries around the world.

GEO's mission is to provide a forum for an open exchange between members, regardless of location, position or affiliation, of the latest information as to the strategic, financial, cultural, legal, tax, communication and administrative issues involving the use of equity-based employee compensation in the global community, from the fundamentals to the latest market intelligence.

GEO is a not-for-profit organization and is governed by a Board of Directors, elected by the GEO membership. The Board of Directors serves the membership and is responsible for the oversight and governance of GEO as well as ensuring that the necessary resources are in place to provide for the longevity of the organization. GEO's Board of Directors is comprised of 28 individuals who represent some of the most accomplished professionals in the global share plan industry.

In addition to the Board of Directors, GEO is represented by a core team of full-time employees who are dedicated to working with GEO members on a daily basis. GEO's headquarters are located in Orange, CA. The GEO team stands ready to provide you with the information and resources you need to facilitate local GEO activities. The core members of the GEO team are:

- ▶ **Danyle Anderson, Executive Director**
- ▶ **Michele Holly, Operations Director**
- ▶ **Britta Puschendorf, Sr. Director, Programs & Member Services**
- ▶ **Pam Stetson, Managing Director, Events**
- ▶ **Debbie Tsoi-A-Sue, Sr. Director, Global Strategic Initiatives**

About GEO Members

GEO members represent a range of companies and institutions involved in and devoted to the employee share plan and executive compensation industry, worldwide. They include decision-makers and influencers from all areas of the global equity compensation community:

- ▶ **Issuing Companies** - Corporate executives, managers, administrators and team members from a wide range of business sectors. Professionals from organizations including publicly-traded, private, pre-IPO, LLC and partnership equity structures.
- ▶ **Service Providers** - Providers of stock plan services including attorneys, accountants, tax advisors, brokers, administrators and consultants.
- ▶ **Academic & Government** - Academic institutions, government bodies, and non-governmental agencies.



LEARN

about crucial information, news and developments that can help you succeed and advance in your careers.



CONNECT

with experts and peers from around the world and next door to share best practices and develop valuable relationships that endure.



EXPERIENCE

a welcoming atmosphere that fosters meaningful dialogue and relationships.



Becoming a GEO Member

Why Join GEO?

Each of our members has their own compelling reasons for joining GEO. Here are just ten reasons why GEO is the leading global share plan community:

1 NETWORK

with **leaders in the areas of global share plans, executive compensation, innovators, academics, experts and professionals** who share best practices from around the world.

2 BENEFIT

from **practical tools & advice** from an organization that operates entirely for the benefit of its membership.

3 CONVERSE

with contacts at your local GEO Chapter or one of many chapter events located in 17 countries.

4 ACCESS

useful and informative resources such as articles, e-newsletters, surveys & white papers.

5 PARTICIPATE

in **industry leadership, topical discussion & debate.**

6 LEARN

crucial information that **ensures your share plans and long-term incentives remain competitive and compliant** and that can help you succeed and advance in your career.

7 JOIN

an unlimited number of informative GEO webcasts, free of charge.

8 CONNECT

and **share advice & resources & raise your profile** with industry experts, peers, clients and new service providers online via GEO's Mentor Matching Program and GEOconnect, GEO's industry-leading private online community.

9 SAVE \$\$\$

on registration and meet peers, experts and service providers at **GEO's global conferences and one-day events.**

10 EARN CE CREDITS

at events that attract **high caliber delegates**, offer a welcoming and respectful atmosphere and foster meaningful dialogue

How to Join GEO

Membership is open to individuals, companies and organizations. To join GEO, visit the 'Become a GEO Member' page of the GEO website - www.globalequity.org/geo/member, or email Michele Holly at michele.holly@globalequity.org.

There are four membership categories:

Issuer Individual Membership

Individual Issuer

Corporate Issuers are defined as companies that provide equity-based plans and programs as part of employee compensation.

Individual membership is \$295 per year.

Issuer Group Membership

Group Issuer

Corporate issuers with three or more individuals can opt to participate in an Issuer Group Membership. Companies who elect to participate receive a discounted fee for 3 or more GEO members. **Group issuer membership is \$745 per year for 3 or more members.**

Service Provider Group Membership

Service Provider

Provider/Advisor Firms provide services to companies providing employee equity compensation plans. Membership is according to size and geographic reach. Once corporate membership is confirmed, all employees working or interested in global equity compensation are entitled to become individual members, free of additional charge.

Service provider membership ranges from \$450 - \$11,500 depending on size and reach of the company.

Academic and Government Membership

Academic and Government

Individuals who are affiliated with any non-profit educational or research institutions or who are affiliated with a national or international government agency/regulatory body are welcome. **Membership for this category is complimentary.**



Member Benefits and Professional Development



GEO offers its members a range of exclusive tools and services, designed to advance their company and their careers. GEO adds value for its members through the delivery of relevant, current, useful and high-quality information and peer introductions.

Membership in GEO benefits professionals at all levels from strategic-minded individuals who are leaders in their fields, to their future successors.

Resources and Services

- ▶ **A thriving membership base** - A peer network with endless opportunities and access to a global community of c. 5,000 individuals from 60+ countries.
- ▶ **Online and offline resources that work for you** - The information generated and shared by GEO members is available across multiple channels, including:
 - ▶ Webcasts;
 - ▶ Weekly e-newsletters;
 - ▶ Exclusive access to the GEO website, including secure member-only sections offering relevant industry content updated frequently;
 - ▶ Dedicated public and private social media networks to promote community discussion;
 - ▶ An annual Global Equity Insights Study which provides insight into the market practices of more than 160+ global participants.
 - ▶ A global membership directory for online networking; and
 - ▶ A job site for industry professionals.
- ▶ **GEOconnect** - A private online community allowing members access to GEO colleagues around the world, 24/7:
 - ▶ Connect and communicate with fellow members;
 - ▶ Participate in focused discussion groups;
 - ▶ Archive and share useful information in document libraries;
 - ▶ Network via a comprehensive member directory;
 - ▶ Contribute to member blogs and create your own; and
 - ▶ Post questions online.
- ▶ **Mentor Match** - An exclusive mentor/mentee matching program facilitating connections between GEO members for technical and career development exchanges.
- ▶ **Volunteer program (Coming Soon!)** - An intuitive system to inspire and encourage volunteerism at all levels.



Annual Global Conference and Events Program

GEO's unrivalled program of industry-leading educational and networking opportunities, events and conferences gather senior professionals from around the globe. In 2017, GEO served more than 2,000 registrants to our events and chapter meetings, delivering industry-leading globally relevant industry education and fostering an open and collaborative



community of industry experts, colleagues and friends. GEO's events include:

- ▶ A flagship annual conference;
- ▶ A US-based National Equity Compensation Forum event (every other year);
- ▶ A Pan European Regional Event;
- ▶ One-day local events in Australia and around the world.

The GEO Awards



The GEO Awards program plays a vital role in raising the profile of companies that take pride in executing superior equity and executive compensation and employee ownership.

The GEO Awards presentation and dinner is held as part of GEO's annual conference and the coveted and prestigious awards play an essential role in the promotion and education of worldwide share ownership, as well as providing attendees an opportunity to network, learn and celebrate as a community.

GEO Chapters

GEO has a robust network of 20+ chapters serving 17 countries around the world. GEO's Chapter Meetings provide frequent opportunities to share ideas and experiences with industry colleagues in your area.



Designed to enhance member value and to strengthen the industry, they are run by senior industry figures and deliver local content that make them especially relevant and valuable for attendees. The informal settings make for approachable and supportive learning environments that cultivate a sense of belonging and community with GEO at the core. Find out more about each GEO Chapter and upcoming events at www.globalequity.org/geo/chapters.

Further Information

Regardless of where you are, GEO puts the world of global equity and executive compensation at your fingertips. For more information, please visit the GEO website: www.globalequity.org.



For additional information or to apply for membership, please contact:

info@globalequity.org | +1 (714)630-2908



"GEO's international scope spans further than other similar organizations and allows me to link directly into individual markets. I look forward to meeting equity peers from other large companies in order to share challenges and learn from their accomplishments at GEO's Annual Conference."

Jorgen Pedersen, Director Group Compensation & Benefits, Saint-Gobain, France