



Tuesday, 14 September 2021

09:30 PDT / 12: 30 EDT / 17: 30 BST / 18: 30 CEST / 00: 30 HKT +1 / 02: 30 AEST +1

Platform Opens

09:30-10:00 PDT / 12: 30-13:00 EDT / 17: 30-18:00 BST / 18: 30-19:00 CEST / 00: 30-01:00 HKT +1 / 02: 30-03:00 AEST +1

Trade Show Open

10:00-11:10 PDT / 13:00-14:10 EDT / 18:00-19:10 BST / 19:00-20:10 CEST / 01:00-02:10 HKT +1 / 03:00-04:10 AEST +1

Opening Comments and Keynote I—LSU Coach Kim Mulkey

GEOvirtual2021 is excited to present the opening Keynote Speaker—LSU Women's Basketball Head Coach **Kim Mulkey**—the most successful player-turned-coach in college basketball history, who has been named head coach of the LSU women's basketball team.

11:10-11:30 PDT / 14:10-14:30 EDT / 19:10-19:30 BST / 20:10-20:30 CEST / 02:10-02:30 HKT +1 / 04:10-04:30 AEST +1

Kickoff Networking and Break

11:30-13:30 PDT / 14:30-16:30 EDT / 19:30-21:30 BST / 20:30-22:30 CEST / 02:30-04:30 HKT +1 / 04:30-06:30 AEST +1

Collaboration Hub

Informal Networking and Post Session Q&A

11:30-12:10 PDT / 14:30-15:10 EDT / 19:30-20:10 BST / 20:30-21:10 CEST / 02:30-03:10 HKT +1 / 04:30-05:10 AEST +1

Breakout Series I

1.1 How to Engage a Remote and Global Workforce COMMUNICATIONS

1.2 Counting the Costs and Balancing the Benefits: Financial Engineering for ESPPs DESIGN AND STRATEGY

1.3 Cryptocurrency—a New Form of Equity Compensation TRENDING NOW



Tuesday, 14 September 2021 (continued)

12:20-13:00 PDT / 15:20-16:00 EDT / 20:20-21:00 BST / 21:20-22:00 CEST / 03:20-04:00 HKT +1 / 05:20-06:00 AEST +1

Breakout Series II

2.1 ESG and Performance Conditions—Real Life Experiences BUSINESS INTELLIGENCE

2.2 Cash in a Flash: The Google Employee Trading Plan DESIGN AND STRATEGY

2.3 Global Equity Insights Survey 2021 DESIGN AND STRATEGY

13:00-13:30 PDT / 16:00-16:30 EDT / 21:00-21:30 BST / 22:00-22:30 CEST / 04:00-04:30 HKT +1 / 06:00-06:30 AEST +1

Trade Show Open

Tuesday, 14 September 2021 Encore

16:30 PDT / 19:30 EDT / 00:30 BST +1 / 01:30 CEST / 07:30 HKT +1 / 09:30 AEST +1

Platform Opens

17:00-18:10 PDT / 20:00-21:10 EDT / 01:00-02:10 BST +1 / 02:00-03:10 CEST +1 / 08:00-09:10 HKT +1 / 10:00-11:10 AEST +1

Opening Comments and Keynote I—LSU Coach Kim Mulkey (Encore Session)

GEOvirtual2021 is excited to present the opening Keynote Speaker—LSU Women's Basketball Head Coach **Kim Mulkey**—the most successful player-turned-coach in college basketball history, who has been named head coach of the LSU women's basketball team.

18:20-19:00 PDT / 21:20-22:00 EDT / 02:20-03:00 BST +1 / 03:20-04:00 CEST +1 / 09:20-10:00 HKT +1 / 11:20-12:00 AEST +1

Day 1 Session Encore

1.1 How to Engage a Remote and Global Workforce (Encore Session) COMMUNICATIONS

1.2 Counting the Costs and Balancing the Benefits: Financial Engineering for ESPPs (Encore Session) DESIGN AND STRATEGY

1.3 Cryptocurrency—a New Form of Equity Compensation (Encore Session) TRENDING NOW



Thursday, 16 September 2021

08:30 PDT / 11:30 EDT / 16:30 BST / 17:30 CEST / 23:30 HKT / 01:30 AEST +1

Platform Opens

08:45-09:30 PDT / 11:45-12:30 EDT / 16:45-17:30 BST / 17:45-18:30 CEST / 23:45-00:30 HKT /
01:45-02:30 AEST +1

Collaboration Hub

GEO Chapter Leaders Community Meeting and Networking

09:30-10:00 PDT / 12:30-13:00 EDT / 17:30-18:00 BST / 18:30-19:00 CEST / 00:30-01:00 HKT
+1 / 02:30-03:00 AEST +1

Trade Show Open

09:30-11:40 PDT / 12:30-14:40 EDT / 17:30-19:40 BST / 18:30-20:40 CEST / 00:30-02:40 HKT
+1 / 02:30-04:40 AEST +1

Collaboration Hub

Informal Networking and Post-Session Q& A

10:00-10:40 PDT / 13:00-13:40 EDT / 18:00-18:40 BST / 19:00-19:40 CEST / 01:00-01:40 HKT
+1 / 03:00-03:40 AEST +1

Breakout Series III

3.1 Mobility Trends in 2021: Tax, COVID, and Making the Most of the New Status Quo

FINANCE, TAX & ACCOUNTING

3.2 Equity and Tax Policy—Why It Matters! DESIGN AND STRATEGY

3.3 Replacing Fixed Pay with Equity EXECUTIVE PAY

10:50-11:30 PDT / 13:50-14:30 EDT / 18:50-19:30 BST / 19:50-20:30 CEST / 01:50-02:30 HKT
+1 / 03:50-04:30 AEST +1

Breakout Series IV

4.1 How to Make Your Equity Grants Compliant with French Regulations? LEGAL/REGULATORY

4.2 Using Equity to Drive Equality TRENDING NOW

4.3 Financial Wellness Through a Lens of Diversity and Inclusion TRENDING NOW



Thursday, 16 September 2021 (continued)

11:40-12:30 PDT / 14:40-15:30 EDT / 19:40-20:30 BST / 20:40-21:30 CEST / 02:40-03:30 HKT
+1 / 04:40-05:30 AEST +1

Showcase Event: Accounting During the Journey to IPO, Sponsored by Morgan Stanley at Work FINANCE, TAX & ACCOUNTING

Tuesday, 21 September 2021

09:45 PDT / 12:45 EDT / 17:45 BST / 18:45 CEST / 00:45 HKT +1 / 02:45 AEST +1

Platform Opens

09:30-10:00 PDT / 12:30-13:00 EDT / 17:30-18:00 BST / 18:30-19:00 CEST / 00:30-01:00 HKT
+1 / 02:30-03:00 AEST +1

Trade Show Open

09:30-11:40 PDT / 12:30-14:40 EDT / 17:30-19:40 BST / 18:30-20:40 CEST / 00:30-02:40 HKT
+1 / 02:30-04:40 AEST +1

Collaboration Hub

Informal Networking and Post-Session Q& A

10:00-10:40 PDT / 13:00-13:40 EDT / 18:00-18:40 BST / 19:00-19:40 CEST / 01:00-01:40 HKT
+1 / 03:00-03:40 AEST +1

Breakout Series V

5.1 Equity and Executive Compensation in Light of Transformation DESIGN AND STRATEGY

5.2 Equality in Equity—Why Ensuring Diversity, Equity and Inclusion Is Critical for Equity Compensation DESIGN AND STRATEGY

5.3 The "Greatest Hits" in Global Equity Compliance LEGAL/REGULATORY

10:50-11:30 PDT / 13:50-14:30 EDT / 18:50-19:30 BST / 19:50-20:30 CEST / 01:50-02:30 HKT
+1 / 03:50-04:30 AEST +1

Breakout Series VI

6.1 Revolutionizing Employee Experiences: Doing It, and Doing It Right DESIGN AND STRATEGY

6.2 Remote Work, No Fixed Abode—People, Payroll and Stock Plans FINANCE, TAX &
ACCOUNTING

6.3 Successful M&A Communication Strategies COMMUNICATIONS



Tuesday, 21 September 2021 (continued)

11:40-12:30 PDT / 14:40-15:30 EDT / 19:40-20:30 BST / 20:40-21:30 CEST / 02:40-03:30 HKT +1 / 04:40-05:30 AEST +1

Showcase Event: Tackling International Taxes 101: Managing Global Tax Issues for Your Equity Plan, Sponsored by Morgan Stanley at Work FINANCE, TAX & ACCOUNTING

Tuesday, 21 September 2021 Encore

16:45 PDT / 19:45 EDT / 00:45 BST +1 / 01:45 CEST / 07:45 HKT +1 / 09:45 AEST +1

Platform Opens

17:00-17:40 PDT / 20:00-20:40 EDT / 01:00-01:40 BST +1 / 02:00-02:40 CEST +1 / 08:00-08:40 HKT +1 / 10:00-10:40 AEST +1

Day 3 Session Encore I

2.2 Cash in a Flash: The Google Employee Trading Plan (Encore Session) DESIGN AND STRATEGY

2.3 Global Equity Insights Survey 2021 (Encore Session) DESIGN AND STRATEGY

3.1 Mobility Trends in 2021: Tax, COVID, and Making the Most of the New Status Quo (Encore Session) FINANCE, TAX & ACCOUNTING

17:50-18:30 PDT / 20:50-21:30 EDT / 01:50-02:30 BST +1 / 02:50-03:30 CEST +1 / 08:50-09:30 HKT +1 / 10:50-11:30 AEST +1

Day 3 Session Encore II

3.2 Equity and Tax Policy—Why It Matters! (Encore Session) DESIGN AND STRATEGY

4.2 Using Equity to Drive Equality (Encore Session) TRENDING NOW

5.1 Equity and Executive Compensation in Light of Transformation (Encore Session) DESIGN AND STRATEGY

Wednesday, 22 September 2021

09:30 PDT / 12:30 EDT / 17:30 BST / 18:30 CEST / 00:30 HKT +1 / 02:30 AEST +1

Platform Opens



Wednesday, 22 September 2021 (continued)

09:30-10:00 PDT / 12:30-13:00 EDT / 17:30-18:00 BST / 18:30-19:00 CEST / 00:30-01:00 HKT +1 / 02:30-03:00 AEST +1

Collaboration Hub

Issuer Council Community Networking Event

10:00-11:30 PDT / 13:00-14:30 EDT / 18:00-19:30 BST / 19:00-20:30 CEST / 01:00-02:30 HKT +1 / 03:00-04:30 AEST +1

Issuer Luncheon Featuring Dr. Marc Milstein

Discover new ways at GEOvirtual2021 to harness the power of knowledge and networking to accelerate your growth and development. This year, GEO is creating a unique online event like no other—join us for GEO's signature "Issuer Luncheon." GEO has planned a special event designed specifically so that Issuers can discuss some of the challenges they've faced in recent months, plus provide an opportunity for you to grab your favorite meal and meet your friends and colleagues.

Thursday, 23 September 2021

09:30 PDT / 12:30 EDT / 17:30 BST / 18:30 CEST / 00:30 HKT +1 / 02:30 AEST +1

Platform Opens

09:30-10:00 PDT / 12:30-13:00 EDT / 17:30-18:00 BST / 18:30-19:00 CEST / 00:30-01:00 HKT +1 / 02:30-03:00 AEST +1

Trade Show Open

09:30-11:40 PDT / 12:30-14:40 EDT / 17:30-19:40 BST / 18:30-20:40 CEST / 00:30-02:40 HKT +1 / 02:30-04:40 AEST +1

Collaboration Hub

Informal Networking and Post-Session Q&A



Thursday, 23 September 2021 (continued)

10:00-10:40 PDT / 13:00-13:40 EDT / 18:00-18:40 BST / 19:00-19:40 CEST / 01:00-01:40 HKT
+1 / 03:00-03:40 AEST +1

Breakout Series VII

7.1 Managing Your Communication Approach—Ensuring an All-Inclusive Communication Strategy COMMUNICATIONS

7.2 Corporate Capital—the CFO Perspective on Stock Purchase Plans and Cashless Participation FINANCE, TAX & ACCOUNTING

7.3 Volatile Stock Prices and Grant and Taxation Trends DESIGN AND STRATEGY

10:50-11:30 PDT / 13:50-14:30 EDT / 18:50-19:30 BST / 19:50-20:30 CEST / 01:50-02:30 HKT
+1 / 03:50-04:30 AEST +1

Breakout Series VIII

8.1 Race and Gender Wealth Equity and the Role of Employee Share Ownership TRENDING NOW

8.2 Using Data and Analytics to Manage Your Compliance Risk FINANCE, TAX & ACCOUNTING

8.3 The Continuing Impact of ESG's Evolution LEGAL/REGULATORY

11:40-12:30 PDT / 14:40-15:30 EDT / 19:40-20:30 BST / 20:40-21:30 CEST / 02:40-03:30 HKT
+1 / 04:40-05:30 AEST +1

Showcase Event: Colin Cloud, The Forensic Mind Reader, Sponsored by Fidelity

Tuesday, 28 September 2021

09:45 PDT / 12:45 EDT / 17:45 BST / 18:45 CEST / 00:45 HKT +1 / 02:45 AEST +1

Platform Opens

10:00-10:30 PDT / 13:00-13:30 EDT / 18:00-18:30 BST / 19:00-19:30 CEST / 01:00-01:30 HKT
+1 / 03:00-03:30 AEST +1

Welcome and Plenary Session Government Policies to Address Economic Inequality Through Equity Compensation

Join **Dr. Joseph Blasi** of Rutgers University in this ground-breaking session for a long-awaited discussion of the impact of coordinated economic and regulatory policies to advance equity compensation as a mechanism to address wealth inequality by employees. Trending Now TRENDING NOW



Tuesday, 28 September 2021 (continued)

10:30-11:20 PDT / 13: 30-14:20 EDT / 18: 30-19:20 BST / 19: 30-20:20 CEST / 01: 30-02:20 HKT +1 / 03: 30-04:20 AEST +1

Keynote II—Financial Wellness: The Next Generation

GEO is pleased to announce that **Krystal Barker Buissereth**, Managing Director and the Head of Financial Wellness at Morgan Stanley at Work, will speak at GEOvirtual2021, addressing trends in financial education across generations, with a special focus on the next generation entering the workforce, Generation Z. TRENDING NOW

11:20-13:30 PDT / 14:20-16:30 EDT / 19:20-21:30 BST / 20:20-22:30 CEST / 02:20-04:30 HKT +1 / 04:20-06:30 AEST +1

Collaboration Hub

Informal Networking and Post-Session Q&A

11:30-12:10 PDT / 14:30-15:10 EDT / 19:30-20:10 BST / 20:30-21:10 CEST / 02:30-03:10 HKT +1 / 04:30-05:10 AEST +1

Breakout Series IX

9.1 De-Risk Executive Pay Programs with Clawbacks and Pay Deferrals EXECUTIVE PAY

9.2 Corporate Tips for Corporate Actions PROGRAM MANAGEMENT

9.3 Country to Country LEGAL/REGULATORY

12:20-13:00 PDT / 15:20-16:00 EDT / 20:20-21:00 BST / 21:20-22:00 CEST / 03:20-04:00 HKT +1 / 05:20-06:00 AEST +1

Breakout Series X

10.1 Increasing Financial Resiliency in Diverse Segments of Your Workforce TRENDING NOW

10.2 Case Study—Making Conditional Share Awards Work for You and Your Employees DESIGN AND STRATEGY

10.3 Intense Scrutiny of CIC Arrangements: Importance of Attention to Detail EXECUTIVE PAY

13:00-13:30 PDT / 16:00-16:30 EDT / 21:00-21:30 BST / 22:00-22:30 CEST / 04:00-04:30 HKT +1 / 06:00-06:30 AEST +1

Trade Show Open



Tuesday, 28 September 2021 Encore

16:30 PDT / 19:30 EDT / 00:30 BST +1 / 01:30 CEST / 07:30 HKT +1 / 09:30 AEST +1

Platform Opens

17:00-17:40 PDT / 20:00-20:40 EDT / 01:00-01:40 BST +1 / 02:00-02:40 CEST +1 / 08:00-08:40 HKT +1 / 10:00-10:40 AEST +1

Day 6 Session Encore I

5.2 Equality in Equity—Why Ensuring Diversity, Equity and Inclusion Is Critical for Equity Compensation (Encore Session) DESIGN AND STRATEGY

5.3 The "Greatest Hits" in Global Equity Compliance (Encore Session) LEGAL/REGULATORY

6.2 Remote Work, No Fixed Abode—People, Payroll and Stock Plans (Encore Session) FINANCE, TAX & ACCOUNTING

17:50-18:30 PDT / 20:50-21:30 EDT / 01:50-02:30 BST +1 / 02:50-03:30 CEST +1 / 08:50-09:30 HKT +1 / 10:50-11:30 AEST +1

Day 6 Session Encore II

6.3 Successful M&A Communication Strategies (Encore Session) COMMUNICATIONS

7.3 Volatile Stock Prices and Grant and Taxation Trends (Encore Session) DESIGN AND STRATEGY

10.1 Increasing Financial Resiliency in Diverse Segments of Your Workforce (Encore Session) TRENDING NOW

Thursday, 30 September 2021

09:30 PDT / 12:30 EDT / 17:30 BST / 18:30 CEST / 00:30 HKT +1 / 02:30 AEST +1

Platform Opens

09:30-10:00 PDT / 12:30-13:00 EDT / 17:30-18:00 BST / 18:30-19:00 CEST / 00:30-01:00 HKT +1 / 02:30-03:00 AEST +1

Trade Show Open

09:30-12:20 PDT / 12:30-15:20 EDT / 17:30-20:20 BST +1 / 18:30-21:20 CEST / 00:30-03:20 HKT +1 / 02:30-05:20 AEST +1

Collaboration Hub

Informal Networking and Post-Session Q&A



Thursday, 30 September 2021 (continued)

10:00-10:40 PDT / 13:00-13:40 EDT / 18:00-18:40 BST / 19:00-19:40 CEST / 01:00-01:40 HKT +1 / 03:00-03:40 AEST +1

Breakout Series XI

11.1 Creating an Equity Compensation Culture DESIGN AND STRATEGY

11.2 Who Is the Employer and Why Does It Matter? BUSINESS INTELLIGENCE

11.3 Management Insights and Equity Programs BUSINESS INTELLIGENCE

10:50-11:30 PDT / 13:50-14:30 EDT / 18:50-19:30 BST / 19:50-20:30 CEST / 01:50-02:30 HKT +1 / 03:50-04:30 AEST +1

Breakout Series XII

12.1 Not Your Typical IPO: Developing Trends in Public Offerings TRENDING NOW

12.2 Somewhere over the Rainbow! Equity in the Post Pandemic World—Is There a Pot of Gold? TRENDING NOW

12.3 Building a Stable and Sustainable Operating Model for Equity Program Management PROGRAM MANAGEMENT

11:40-12:20 PDT / 14:40-15:20 EDT / 19:40-20:20 BST / 20:40-21:20 CEST / 02:40-03:20 HKT +1 / 04:40-05:20 AEST +1

Breakout Series XIII

13.1 Overcoming the Barrier: Building Cross-Department Connections COMMUNICATIONS

13.2 Payroll Challenges for Globally Mobile Employees FINANCE, TAX & ACCOUNTING

13.3 Making Waves with a Global ESPP—Top 5 Challenges of a Global Employee Stock Purchase Plan DESIGN AND STRATEGY

Tuesday, 05 October 2021

09:30 PDT / 12:30 EDT / 17:30 BST / 18:30 CEST / 00:30 HKT +1 / 03:30 AEDT +1

Platform Opens

09:30-10:00 PDT / 12:30-13:00 EDT / 17:30-18:00 BST / 18:30-19:00 CEST / 00:30-01:00 HKT +1 / 03:30-04:00 AEDT +1

Trade Show Open



Tuesday, 05 October 2021 (continued)

09:30-12:30 PDT / 12:30-15:30 EDT / 17:30-20:30 BST +1 / 18:30-21:30 CEST / 00:30-03:30 HKT +1 / 03:30-06:30 AEDT +1

Collaboration Hub

Informal Networking and Post-Session Q&A

10:00-10:40 PDT / 13:00-13:40 EDT / 18:00-18:40 BST / 19:00-19:40 CEST / 01:00-01:40 HKT +1 / 04:00-04:40 AEDT +1

Breakout Series XIV

14.1 New Horizons: Social Justice, D & I and ESG Agenda...Charting the Course to a Better Future TRENDING NOW

14.2 You've Got a Hold on Me! DESIGN AND STRATEGY

14.3 Unpacking APAC—Tackling Troublesome Tax and Legal Issues FINANCE, TAX & ACCOUNTING

10:50-11:30 PDT / 13:50-14:30 EDT / 18:50-19:30 BST / 19:50-20:30 CEST / 01:50-02:30 HKT +1 / 04:50-05:30 AEDT +1

Breakout Series XV

15.1 "Say Hello, Wave Goodbye"—Tackling Global Issues Relating to Joiners and Leavers LEGAL/REGULATORY

15.2 A Million Different Pieces—Don't Let the Complexities of an M&A Transaction Impede the Outcome PROGRAM MANAGEMENT

15.3 A Change Is Gonna Come—How to Embrace Change and Make It Work for Your Business TRENDING NOW

11:40-12:30 PDT / 14:40-15:30 EDT / 19:40-20:30 BST / 20:40-21:30 CEST / 02:40-03:30 HKT +1 / 05:40-06:30 AEDT +1

Showcase Event: Stock Market Basics to Optimize Your Employee Stock Plans, Sponsored by Bank of America TRENDING NOW

Thursday, 07 October 2021

09:45 PDT / 12:45 EDT / 17:45 BST / 18:45 CEST / 00:45 HKT +1 / 03:45 AEDT +1

Platform Opens



Thursday, 07 October 2021 (continued)

09:45-11:40 PDT / 12:45-14:40 EDT / 17:45-19:40 BST +1 / 18:45-20:40 CEST / 00:45-02:40 HKT +1 / 03:45-05:40 AEDT +1

Collaboration Hub

Informal Networking and Post-Session Q&A

10:00-10:40 PDT / 13:00-13:40 EDT / 18:00-18:40 BST / 19:00-19:40 CEST / 01:00-01:40 HKT +1 / 04:00-04:40 AEDT +1

Breakout Series XVI

16.1 Understanding the Participation Decision DESIGN AND STRATEGY

16.2 Current Issues in Equity Compensation TRENDING NOW

16.3 Chopped: Cutting Back Your Equity Charges FINANCE, TAX & ACCOUNTING

10:50-11:30 PDT / 13:50-14:30 EDT / 18:50-19:30 BST / 19:50-20:30 CEST / 01:50-02:30 HKT +1 / 04:50-05:30 AEDT +1

Breakout Series XVII

17.1 Equity and Mobility Just Got BIGGER! From the Frontlines to the Home Office of Work Anywhere FINANCE, TAX & ACCOUNTING

17.2 Global Plans—Common Mistakes and How to Avoid Them LEGAL/REGULATORY

17.3 Your Options for Donating Options...and Other Employee Shares: The How-to Guide BUSINESS INTELLIGENCE

11:40-12:45 PDT / 14:40-15:45 EDT / 19:40-20:45 BST / 20:40-21:45 CST / 02:40-03:45 HKT +1 / 05:40-06:45 AEDT +1

Keynote III—Natalie Nixon, PhD and Closing Comments

Natalie Nixon, PhD is a creativity strategist and President of Figure 8 Thinking, LLC. She helps companies become more dynamic versions of themselves. She serves as a strategic advisor to achieve customer-facing business goals and innovation. She applies her expertise in strategic foresight, qualitative research and design thinking.

Thursday, 07 October 2021 Encore

16:45 PDT / 19:45 EDT / 00:45 BST +1 / 01:45 CEST +1 / 07:45 HKT +1 / 10:45 AEDT +1

Platform Opens



Thursday, 07 October 2021 Encore (continued)

17:00-18:05 PDT / 20:00-21:05 EDT / 01:00-02:05 BST +1 / 02:00-03:05 CEST +1 / 08:00-09:05 HKT +1 / 11:00-12:05 AEDT +1

Keynote III—Natalie Nixon, PhD and Closing Comments Encore

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Keynotes

Keynote I—LSU Coach Kim Mulkey

TRENDING NOW

GEOvirtual2021 is excited to present the opening Keynote Speaker—LSU Women's Basketball Head Coach Kim Mulkey—the most successful player-turned-coach in college basketball history, who has been named head coach of the LSU women's basketball team.

Mulkey comes to Baton Rouge as the most accomplished head coaching hire in LSU history. She returns to her home state of Louisiana as a six-time national champion and nine-time Hall of Famer who is set for induction into the Naismith Memorial Basketball Hall of Fame in May. Mulkey, who also won an Olympic Gold Medal in 1984, is the only person in college basketball history, men's or women's, to win national championships as a head coach, assistant coach and a player.

Kim Mulkey, LSU Coach (US)

Keynote II—Financial Wellness: The Next Generation

TRENDING NOW

Global share plan professionals and leaders are being asked to effectively execute their roles in the face of changing employee expectations with greater emphasis being placed on employers to promote financial wellness amongst their employees.

GEO is pleased to announce that Krystal Barker Buissereth, Managing Director and the Head of Financial Wellness at Morgan Stanley at Work, will speak at GEOvirtual2021, addressing trends in financial education across generations, with a special focus on the next generation entering the workforce, Generation Z. These tech savvy, socially responsible young adults are experiencing heightened levels of financial stress and are increasingly turning to their employers to provide financial education and tools that help them manage their financial lives.

Krystal Barker Buissereth, Morgan Stanley at Work (US)



Keynote III—Natalie Nixon, PhD

TRENDING NOW

Natalie Nixon, PhD is a creativity strategist and President of Figure 8 Thinking, LLC. She helps companies become more dynamic versions of themselves. She serves as a strategic advisor to achieve customer-facing business goals and innovation. She applies her expertise in strategic foresight, qualitative research and design thinking.

Natalie is a global speaker and a published author (Strategic Design Thinking, INC online and a forthcoming book in summer 2020, *The Creativity Leap*). She earned her BA in Anthropology and Africana Studies from Vassar College and her PhD in Design Management from the University of Westminster.

Natalie Nixon, PhD, Strategy, Foresight and Innovation Expert; President and Founder of Figure 8 Thinking, Author, and Creativity Guru (US)

Special Events

Issuer Luncheon Featuring Dr. Marc Milstein

Discover new ways at GEOvirtual2021 to harness the power of knowledge and networking to accelerate your growth and development. This year, GEO is creating a unique online event like no other.

Join us for GEO's signature "Issuer Luncheon." This year, GEO has planned a special event designed specifically so that Issuers can discuss some of the challenges they've faced in recent months, plus provide an opportunity for you to grab your favorite meal and meet your friends and colleagues. While this year has often been filled with challenges, we've all learned to take a step back and examine what's important and how to show up in a way that's best for ourselves, our work, and our community. Learn more about how you can:

- Boost motivation, focus, and productivity in a work from home environment based on how your brain works
- Increase happiness and manage stress and anxiety in our uncertain world



Meet Dr. Marc Milstein

Dr. Marc Milstein specializes in taking leading scientific research on health and happiness to deliver powerful presentations that leverage science-based solutions to keep the brain healthy, lower the risk of dementia, enhance productivity, and maximize longevity.

[Learn more about Dr. Marc Milstein](#)

Sponsored by



Dr. Milstein has been quoted breaking down and analyzing the latest research in popular press such as USA Today, Huffington Post, and Weight Watchers Magazine. Dr. Milstein has also been featured on TV's "Dr. Oz" show, explaining the latest scientific breakthroughs that improve our lives. Dr. Milstein's upcoming book "Keeping Your Brain Young" will be published in 2022.

Plenary Session: Government Policies to Address Economic Inequality Through Equity Compensation

TRENDING NOW

Join this ground-breaking session for a long-awaited discussion of the impact of coordinated economic and regulatory policies to advance equity compensation as a mechanism to address wealth inequality by employees. Equipped with very recent sample data, attendees will learn about equity compensation in the U.S. population and apply these lessons to other countries in the world. Did you know that more than 75% of all capital ownership and more than 90% of all capital income (capital gains, dividends, and interest) is held by the richest 10% of families in the U.S.? With figures that are comparable for other countries, and real wages for many groups of middle-class earners relatively flat, shares of equity and profit sharing are the only way to expand the middle class. Second, the current policies to advance equity compensation in the U.S. specifically are nearly an entire century old and need updating. Third, with approximately \$1 trillion in tax expenditures, subsidies and benefits offered by the U.S. Government every five years, a more comprehensive and determined approach is needed to help expand equity compensation. Make your plans to join in this much needed discussion on economic policy and share plans—and walk away knowing what you can do to make a difference for those who follow!

Dr. Joseph Blasi, Rutgers University (US)

Showcase Event: Accounting During the Journey to IPO, Sponsored by Morgan Stanley at Work

FINANCE, TAX & ACCOUNTING



Getting ready to go public via an initial public offering (IPO)? Join us for a discussion that might help your accounting team prepare for the upcoming journey. We know that this process can often be overwhelming – to help with this, we will highlight changes to reporting requirements, ways to prepare, and common decision points. This session could help your team make thoughtful decisions, and help streamline the transition to becoming a public company (including success in your new and ongoing reporting needs).

Talking Points:

1. Where has my cap table gone?
2. How does the IPO change my valuation process?
3. What can I do to prepare ahead of time?

Nicole Dmitruchina, Morgan Stanley at Work (US)

Sean Kelly, Morgan Stanley at Work (US)

Cassandra Ogle, Morgan Stanley at Work (US)

Disclosure

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Morgan Stanley Smith Barney LLC. Member SIPC.

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Morgan Stanley
AT WORK

Showcase Event: Colin Cloud, The Forensic Mind Reader, Sponsored by Fidelity

Described as the closest thing to a real-life Sherlock Holmes, Cloud's award-winning act will leave your audience inspired, astounded, and mesmerized.

Colin Cloud, The Forensic Mind Reader (UK)

Sponsored by

Fidelity

Showcase Event: Stock Market Basics to Optimize Your Employee Stock Plans, Sponsored by Bank of America

Gain a wide-ranging understanding of essential stock market operations, from how the stock market really works, the roles of the broker and floor trader to order flow and share settlement.

You'll also hear insights on trade processing, employee education, and why block trading is vital to market optimization for employee stock plans.

David Lanka, Bank of America (US)
Sean O'Brien, Bank of America (US)

Showcase Event: Tackling International Taxes 101: Managing Global Tax Issues for Your Equity Plan, Sponsored by Morgan Stanley at Work

FINANCE, TAX & ACCOUNTING

Expanding to new jurisdictions is a huge milestone for most companies, but it also introduces an array of new obligations. That's especially true if you offer equity to employees in multiple states or countries and if they're moving between locations. Whether your company is offering equity awards in new states or countries because of planned growth, or because COVID-19 has made it so your participants ended up in unexpected locations, each state and country have their own tax obligations that apply to equity plans and you shouldn't assume your current plan will be compliant in these jurisdictions.

In this seminar, we will provide a primer on some of the major tax reporting and withholding obligations you might encounter with your global equity plan, and trends we see in the marketplace.

Justin Pon, Morgan Stanley at Work (CA)

Disclosure

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AT WORK

Breakout Series I

1.1 How to Engage a Remote and Global Workforce

COMMUNICATIONS

2020's global pandemic brought a sea change to how we work, how we engage with work, and how we engage with each other. The stress and distraction of the past eighteen months has driven some employees from mild inattention to 'active' disengagement. Coupled with new challenges and distractions in this work-from-anywhere world, employees' needs have shifted dramatically. And in order to reach employees, companies must really step-up their communications game—telling stories that work, across



all borders! Join our panel of experts for a look at current communication challenges, hear the stories of 2020 and the important lessons we learned and walk away with new ideas on changing the future of engagement.

John Hammond, FGE, Aon (US)

Anthony Pettinelli, EPAM Systems (US)

Nancy Rush, Lincoln Financial Group (US)

Julia Tensfeldt, UBS (US)

1.2 Counting the Costs and Balancing the Benefits: Financial Engineering for ESPPs

DESIGN AND STRATEGY

Employee Stock Purchase Plans have long been favored for delivering equity compensation to a broad base of employees. The case for an ESPP has never been stronger as companies look to equity to manage cash and provide compelling pay and benefits to all employees. ESPPs can be designed in a variety of ways to balance these seemingly conflicting objectives and still meet a company's financial goals and constraints, while offering benefits that aren't captured if participation is the only measurement of success. From cash flow to dilution to tax benefits, companies at any stage of life cycle or financial situation can engineer the benefits offered and source of the shares of an ESPP to achieve specific financial statement goals. Join this panel of emissaries of ESPPs as they evaluate ESPP designs with a new and thought-provoking approach.

Emily Cervino, FGE, Fidelity (US)

Matthew Connor, FGE, Lucid Motors (US)

Donna Hammer, Snowflake (US)

Elizabeth Stoudt, Infinite Equity (US)

1.3 Cryptocurrency—a New Form of Equity Compensation

TRENDING NOW

Are we moving from a discussion of options, RSUs, and PSUs to one of tokens, RTUs, and NFTs? This session explores the explosive growth of cryptocurrency in the global financial markets and the impact on employee compensation. Crypto is supplementing—and in some companies, replacing—equity-based compensation. The strategic and technical issues are comparable to those of equity compensation, squared. The market dynamics are overwhelming. This expert panel will discuss strategy, tax, regulatory considerations, accounting, valuation, volatility, liquidity, employee communications, and more. The discussion will include examples of companies already using crypto to compensate employees, Directors, and advisers. Attend this session to hear the latest on crypto—the newest form of equity compensation!

Sinead Kelly, Baker McKenzie (US)

Nathan O'Connor, Equity Methods (US)

Fred Whittlesey, Compensation Venture Group, SPC (US)



Breakout Series II

2.1 ESG and Performance Conditions—Real Life Experiences

BUSINESS INTELLIGENCE

Regulators, shareholders, politicians, stakeholders, and society in general now increasingly expect companies to take a more holistic and sustainable approach to value creation—including through the incorporation of ESG into performance targets. Join this panel of experts as they consider how the ESG landscape has changed and continues to develop in the context of executive remuneration, and how that landscape may develop looking forward. Sharing valuable insights gleaned from some of the listed companies, this expert panel will share details of how companies are incorporating ESG elements into their executive remuneration, as well as trends in ESG use globally. Additionally, the panelists will each share their experiences of the implementation of ESG performance targets within their organizations and how ESG factors into their respective companies' strategy.

Helen Baker, Coca-Cola Europacific Partners PLC (UK)

Sarah Bruce, Tapestry Compliance (UK)

Véronique Japp, Maersk Drilling (DK)

Emma Parker, Tapestry Compliance (UK)

2.2 Cash in a Flash: The Google Employee Trading Plan

DESIGN AND STRATEGY

Employee populations have diverse financial needs, especially in today's dynamic world. How do we help them control their cash flow, value shareholding, and alleviate personal administrative burdens, all while remaining scalable and compliant? Join this session to hear about the collaboration between Google and its service providers to create a program that offers employees the convenience of setting up an automated trading plan. This expert panel will share their considerations and challenges when designing this unique program, their education and communications strategies, and the launch experience—everything you need to know and more about the Google Employee Trading Program!

Carolina Ellerker, Alphabet (US)

Eileen Nguyen, Alphabet (US)

Ben Ramos, Charles Schwab (US)

Larry Reynolds, Morgan Stanley at Work (US)

2.3 Global Equity Insights Survey 2021

DESIGN AND STRATEGY

The Global Equity Insights Survey (GEIS) is the foremost assessment of current market practice and trends in equity compensation globally. This year's study will address the use of equity on a worldwide level as a long-term incentive and broad-based tool, as well as important topics such as plan types and design. The study also covers deep insights into the communication and administration of equity plans,



equal pay, and the impact of COVID-19 on share plans. Our expert panel will come equipped to share how the study findings over the years should influence your human resources and equity compensation strategies right now and into the future. Join us as we share the major results from this year's survey as well as take a look at the evolution of findings since the study's inception.

Sheila Frierson, Computershare (US)

Mitan Patel, Fidelity (UK)

Sandra Sussman, FGE, SAP (US)

David Voggeser, hkp/// group (DE)

Sebastian Wetzel, Siemens Energy AG (DE)

Breakout Series III

3.1 Mobility Trends in 2021: Tax, COVID, and Making the Most of the New Status Quo

FINANCE, TAX & ACCOUNTING

COVID-19 has transformed how and where we live and work. As a result, equity plan administrators face unprecedented tax implications and an increasingly complex global mobility landscape. Join these experts for a discussion of recent trends in employee mobility, details of how the current environment impacted their tax calculation and reporting obligations, and how they adapted their mobility practices. With the mobility "devil" in the details, this panel will bring you face-to-face with the real world, practical application of mobility compliance requirements and arm you with expert recommendations to bravely conquer this complex area.

Jay Christiansen, Square, Inc. (US)

Howard Lewis, Morgan Stanley at Work (CA)

Julia Liu, Dropbox (US)

Keith Pietrzak, Morgan Stanley at Work (US)

3.2 Equity and Tax Policy—Why It Matters!

DESIGN AND STRATEGY

Join us for a timely discussion focused on why today, more than ever before, it is imperative to address your tax policy in your global share plan design and strategy. In a world where mobility, remote workforce, and work anywhere policies have become prevalent for so many, companies have rapidly moved beyond using a flat tax rate per country or level to far more complex and relevant designs. This session will look at ways companies have addressed these complex arrangements to better support the employee participant, enabling them to deliver the most shares or cash to the employee while remaining compliant with good governance. Downstream, other stakeholders in mobility, finance, payroll, and corporate tax can benefit from the tax policies and decisions you make with your equity program. Join us to hear directly from experienced practitioners and issuers who will share their journeys, including how they leveraged automation and consistency to drive important improvements.



Leann Balbona, FGE, KPMG (US)

Diederik Blanken, Walmart, Inc. (US)

Ryan Borgmann, KPMG (US)

Nalini Johnson, Aon Corporation (US)

3.3 Replacing Fixed Pay with Equity

EXECUTIVE PAY

Given the continuing economic uncertainty due to the COVID-19 pandemic, companies are concerned with maintaining cash flow and cutting costs wherever possible. This panel of experts from France, Germany, the UK and the US will discuss whether it's possible, and advisable, to replace a portion of an employee's salary with equity grants, and the related employment, securities, and tax law considerations for doing so. Attend this session and learn about consent, the risks, and the important tax and transparency considerations to replacing fixed pay with equity.

Nicholas Greenacre, White & Case (UK)

Alexandre Jaurett, White & Case (FR)

Hendrik Roeger, White & Case (DE)

Victoria Rosamond, White & Case (US)

Breakout Series IV

4.1 How to Make Your Equity Grants Compliant with French Regulations?

LEGAL/REGULATORY

Adapting US plans to French requirements typically presents a challenge to share plan professionals. Join in on this session to participate in a lively discussion of the relevant French regulations and the challenges they present that you should be aware of before drafting your plan, including addressing how to adapt plan rules to French regulations in consideration of the US rules 409A and 162(m). Attendees to this session will get the most up-to-date information and best practices directly from the experts on this challenging country and will walk away with the ability to onboard French employees properly, whatever the type of LTI program you have. Join us in this important review and leave with the ability to sleep easy, knowing your French plans are compliant. Sweet dreams!

Oriane Acheriteguy, Deloitte/TAJ (FR)

Franck Duez, CIC - Banque Transatlantique (FR)

Matthieu Gonbert, Banque Transatlantique (FR)

4.2 Using Equity to Drive Equality

TRENDING NOW



ESG, or Environmental, Social and Governance criteria have been talked about for years, but the circumstances of the past eighteen months have brought them to the forefront. Now that we've set goals at a corporate level to do better, how do we enact the changes we desire? Join this passionate group of equity professionals in discussing the role that equity compensation plays in driving ESG and how to utilize performance awards (short- and long-term) to drive goals. And now that we've seen ESG metrics in action during the 2021 proxy season, we'll discuss best practices and lessons learned from early adopter case studies, and the role that these goals play in the financial success of the company.

Amanda Benincasa, Aon (US)

Anitha Dhanwada, OppFi (US)

Elena Thomas, Plan Management Corporation | OptionTrax (US)

4.3 Financial Wellness Through a Lens of Diversity and Inclusion

TRENDING NOW

Attend this groundbreaking session to examine Bank of America's research study delving into the perceptions of each study participant's own financial wellness and the resource preferences to best meet their needs. These insights will further your understanding on how to best deliver on behalf of your employees as their demographics continue to change. Join the subject-matter experts who drove this research as they discuss these insights.

Danyle Anderson, FGE, Global Equity Organization (US)

Surya Kolluri, Bank of America (US)

Kai Walker, Bank of America (US)

Breakout Series V

5.1 Equity and Executive Compensation in Light of Transformation

DESIGN AND STRATEGY

Join us as we examine the share plan challenges encountered during the spin-off of Siemens Energy from Siemens and the subsequent successful rollout of the broad share plan portfolio. This panel of experts will share details of this giant-sized transformation, walking through the unique evolution of Siemens in the past several years from the IPO of Siemens Healthineers to the spin-off of Siemens Energy and the corresponding design and implementation of the executive remuneration program, and the complimentary equity portfolio. Attend this session to hear about the challenges and effects of events such as a spin-off on a global employee share program and learn tips and tricks from these masters that will prepare you for your very own transformation experience.

Julia Bartsch, Siemens Energy AG (DE)

Michael Haverkamp, Siemens AG (DE)

Manuel Kälin, Equatex, Part of the Computershare Group (CH)

Markus Stebe, Siemens AG (DE)

David Voggeser, hkp/// group (DE)



5.2 Equality in Equity—Why Ensuring Diversity, Equity and Inclusion Is Critical for Equity Compensation

DESIGN AND STRATEGY

Diversity, equity and inclusion are key topics today. Not only in regard to how employers address these issues overall, but specifically in the way they impact employee benefits. Join this panel of experts as they share important research on why this should matter to your company, as well as deliver real life examples of how companies are approaching the topic and prioritizing areas of focus. Attendees to this timely and relevant session will enjoy a big picture discussion of this important issue as well as a deeper dive into practical suggestions aimed at helping companies prepare for the future, including an exploration of the challenges of gathering data necessary to meet recently implemented international and domestic reporting requirements.

Priscilla de Leede, Russell Advocaten (NL)

Maura Gallagher-Vaughn, UBS (US)

Alberto Gomes Da Silva, W.P. Carey (US)

Carine Schneider, FGE, Astrella (US)

Julia Tensfeldt, UBS (US)

5.3 The "Greatest Hits" in Global Equity Compliance

LEGAL/REGULATORY

Take a stroll down the virtual highway with this esteemed panel to hear all about the latest global "hits" from regulatory and tax share plan authorities. Professionals from top companies will share their experiences in dealing with required changes and will offer practical tips to avoid singing the blues with respect to the newest developments and their impact on your global plans. Whether it is updating your songbook (employee communications) or changing your tune (implementing new administration processes), the panel will offer helpful guidance so you can ensure that your company and your employees are best positioned to take it to the next "gold record" level!

Jennifer Kirk, Baker McKenzie (US)

Peter Kontara, Uber (US)

Randy Murphy, Airbnb (US)

Aimee Soodan, Baker McKenzie (US)

Breakout Series VI

6.1 Revolutionizing Employee Experiences: Doing It, and Doing It Right

DESIGN AND STRATEGY

As the lines blur between work and life, how has your company considered the employee experience for your human capital? This panel of experts in the people operations, stock administration, and financial



wellness space will share their collective experience in, and knowledge about, transforming the employee experience and what that can mean for your company. Topics will include assessing the user experience, deploying meaningful programs and tools around equity and financial wellness benefits, and seeing financial wellness further than employee savings, but as part of the broader HR strategy and company-wide employee experience. Join us for an engaging session featuring one of the industry's hottest topics in 2021!

Kayla Logan, Amazon (US)

Nicole Sloane, Kimberly-Clark Corporation (US)

Alison Wolfe, Morgan Stanley at Work (US)

6.2 Remote Work, No Fixed Abode—People, Payroll and Stock Plans

FINANCE, TAX & ACCOUNTING

For much of the business world, life has been turned upside down with the nearly overnight requirement for most employees to work from home. More than 18 months in, there is little consensus on a "return-to-office strategy" short of this: remote work isn't going away. Remote employees aren't new, but the sheer number of remote workers continues to generate many new challenges for global stock administrators and other employee support functions. Join this session to learn the practical considerations necessary when defining and launching a distributed workforce program. This panel of experts will dive into operational considerations, compensation and tax withholding strategies associated with remote work—whether temporary or permanent—to meet these important challenges efficiently and effectively, while also providing your employees with a high level of care.

Jillian Forusz, Adobe (US)

Nancy Kobs, Palo Alto Networks, Inc. (US)

Mark Miller, Deloitte Tax (US)

6.3 Successful M&A Communication Strategies

COMMUNICATIONS

Mergers and acquisitions combine company cultures and bring people together. It's a lot of work! Join this session for a focused look at the people strategy necessary in an M&A environment. Learn active strategies for onboarding newly acquired employees and the critical role communications play in retention and engagement. From an issuer and provider perspective, gain insights and practical tips for developing an effective communications and education campaign that will successfully onboard new employees and withstand the test of time.

Wendy Jennings, FGE, DataRobot (US)

Renee Kettelle, Charles Schwab (US)



Breakout Series VII

7.1 Managing Your Communication Approach—Ensuring an All-Inclusive Communication Strategy

COMMUNICATIONS

The successful issuance and uptake of incentive schemes is largely reliant on communication between plan issuer and participants, a requirement that has been highlighted by and complicated with the recent increase of remote work. Ongoing and effective communication from the commencement of work and throughout the employment lifecycle is imperative. This session will take a focused look at the various stages of share plan communication, address some of the constraints that may pose a challenge to the successful and ongoing management of an incentive plan, and share how these challenges can be overcome via the use of technology.

Reghardt Dippenaar, The Standard Bank of South Africa Limited | SBG Securities (ZA)

Michael Ketz, ShareForce 360 (ZA)

Louis Pretorius, Anglo American, Kumba Iron Ore (ZA)

7.2 Corporate Capital—the CFO Perspective on Stock Purchase Plans and Cashless Participation

FINANCE, TAX & ACCOUNTING

There's no doubt that employee stock purchase plans are fantastic for employees, but what's the bottom line when it comes to the corporate impact? Different plan designs, of course, have different costs and benefits to each company. In addition, Cashless Participation is a new alternative, but how does this all shake out for our balance sheets, income statements, and from a cash flow perspective?

Join these panelists as they discuss the corporate financial considerations with respect to different (traditional) plan designs, versus what the inclusion of Cashless Participation does to the picture. The discussion will include the 423(b) filing processes, the benefits of Cashless Participation versus other capital infusion methods, the coordination of goals, along with real world tips, and next steps.

John Bagdonas, Global Shares (US)

Cally Bruce, Carver Edison (US)

Dennis McGrath, PAVmed (US)

Elizabeth Stoudt, Infinite Equity (US)

7.3 Volatile Stock Prices and Grant and Taxation Trends

DESIGN AND STRATEGY

Stock price volatility can either mean great news or bad news for a global equity plan and its administration. Many companies have created their equity awards and vesting schedules using a value-based approach, ultimately, spelling disaster for your equity plan. Imagine explaining to your employees why they are receiving a diminished number of shares at grant or vest, or even worse, why your plans are



delivering zero shares after tax withholding—not exactly the intended outcome to issuing employees equity and promoting an employee ownership culture. Join us as we explore the challenges of value-based awards, including an interesting look at the actual experience of two companies with triple digit stock prices and learn their approaches to solving the equity value to share ratio problem.

Laura Gilfeather, SBA Communications Corporation (US)

Michelle Tomasetti, CompIntelligence (US)

Kerrie Wittmer, Contractor Citrix (US)

Breakout Series VIII

8.1 Race and Gender Wealth Equity and the Role of Employee Share Ownership

TRENDING NOW

Even before the pandemic, in an allegedly strong economy, workers at the bottom end of the opportunity scale were struggling to support themselves and their families. Not only have the incomes of the lowest paid workers stagnated or fallen even as the cost of essentials, such as housing, have climbed, but wealth inequality has soared. Workers and families in low-wealth households face daunting barriers to achieving common financial goals and the pandemic has exacerbated and heightened awareness of these inequities. Broadening opportunities to participate in the ownership of business assets can help address this wealth divide and offer working people the opportunity to meaningfully participate in the success of our economy. In addition, employee share ownership can contribute to business resilience and job retention in communities and can play an important part in supporting economic recovery. Drawing on important recent research, this insightful and timely session will show why policymakers, funders, and investors (and anyone!) who cares about racial and gender wealth equity should support employee share ownership and the ways in which they can do so in practice.

Dr. Joseph Blasi, Rutgers University (US)

Robyn Shutak, FGE, Computershare (US)

Jenny Weissbourd, The Aspen Institute Economic Opportunities Program (US)

8.2 Using Data and Analytics to Manage Your Compliance Risk

FINANCE, TAX & ACCOUNTING

Operating a multi-national company offers unique challenges when managing a total rewards program for a global workforce. Those challenges are further compounded with the introduction of work anywhere and remote working arrangements. This past year companies have needed to look more closely at where employees were actually working to assess and address potential risks when delivering compensation and rewards to employees working in locations other than their homework location or international assignment. Join this session to hear how two companies expertly used data analytics to assess their exposure and appropriately focus their efforts on revisions to total rewards policy and practice. By



gathering and analyzing this data, these companies were able to adjust corporate work location policies and mitigate payroll and corporate tax risk, all while maintaining a positive employee experience.

Timothy Cavanaugh, General Motors (US)

Jennifer Link, KPMG (US)

Shashwat Nishchal, BlackRock (US)

8.3 The Continuing Impact of ESG's Evolution

LEGAL/REGULATORY

ESG has continued to rise in importance, driven by regulators' continuing changes in disclosure, institutional investors' screens, and lawmaking and guidance at the federal, state, and local levels. Boards and senior executives are under pressure to put more oversight on human capital and align corporate remuneration schemes with stakeholder interests which ensure diversity from the top down. This panel, will provide an update on the status of ESG regulation, legislation, and investor sentiment, explain how ESG considerations are impacting equity award design and proxy disclosures, and discuss the practical implications for equity compensation professionals. Attend this session to hear the latest on ESG!

Stephen Fackler, Gibson, Dunn & Crutcher (US)

Don-Tobias Jol, Baker McKenzie (NL)

Josh Schaeffer, PhD, Equity Methods (US)

Fred Whittlesey, Compensation Venture Group, SPC (US)

Breakout Series IX

9.1 De-Risk Executive Pay Programs with Clawbacks and Pay Deferrals

EXECUTIVE PAY

Recent controversies around well-known, brand name companies, and associated investor, media, and public interest in executive accountability has led to a renewed focus on compensation clawbacks and a push for more innovative and effective ways to de-risk executive compensation, including through the use of mandatory shareholding periods and pay deferrals. In this session, the expert panelists will discuss recent trends and best practices in compensation recovery and deferral around the world, outline the pros and cons of clawbacks versus holdback or deferral of compensation, and provide practical tips to help companies get buy-in from the CEO and Compensation Committee.

Shaun Bisman, Compensation Advisory Partners (US)

Sinead Kelly, Baker McKenzie (US)

Josée Wilson, Allstate (US)



9.2 Corporate Tips for Corporate Actions

PROGRAM MANAGEMENT

The term 'corporate action' strikes terror into the heart of most equity plan managers! But it doesn't always have to be a terrifying experience. There are a million and one things to consider, and many stakeholders involved, but there are ways to plan ahead and approach things differently. Whether you are looking at stock splits, dividends, mergers and acquisitions, rights issues or spin-offs...there are ways to approach your corporate action that make things a little easier. Join this panel of experts to hear some insightful tips from those that have recently completed corporate actions; and an equity administrator who supports numerous clients annually to make changes to their global company equity plans. Whether focusing on migrating another company with a different employee culture and needs; or managing across global stakeholders, not every corporate action needs to end in burnout. Attend this session to hear the lessons learned to make your experience the best it can be!

Amanda Benincasa, Aon (US)

Sarah Conrad, Fidelity (US)

Aftab Ibrahim, T-Mobile US (US)

Eileen Lacamera, Pfizer (US)

9.3 Country to Country

LEGAL/REGULATORY

Join us for an insightful look at the global operation and compliance of incentive plans in the 'new normal.' This not-to-be-missed panel will discuss important topics including essential updates on recent legal, tax and regulatory changes around the world including securities laws, foreign exchange, and tax challenges. No global session would be complete without including a review of hot topics in especially challenging environments like Canada, China, the EU, and the UK (post-Brexit). Attend this session to learn how best to conduct due diligence to cover your employee population, wherever your employees may be, and how changes to the modern workforce affect global incentive plans, remote working, and gig economy workers. If you can attend one global updates session, make sure you don't miss this one!

John Ball, GAM (UK)

Chris Fallon, Tapestry Compliance (UK)

Tom Parker, Tapestry Compliance (UK)

Julie Shepherd, FGE, The Sage Group (UK)

Emilie Sylvester, Tapestry Compliance (UK)

Breakout Series X

10.1 Increasing Financial Resiliency in Diverse Segments of Your Workforce

TRENDING NOW



As more employers take a holistic approach to talent care, offering meaningful and comprehensive benefits has become a requirement. However, the starting line isn't the same for all of your employees. As diversity, equity, and inclusion become strategic keys in all areas of business, these concepts should carry over into financial wellness programs for the work to make a true impact. This panel of stock plan professionals will discuss how financial wellness programs and other benefits-related offerings may help to foster financial resiliency in different employee populations, such as BIPOC and women, and how the specific needs of these individuals can vary. You'll leave with a better sense of what true equity can be with your programs, and tactical tips for maximizing the benefits delivered by your programs.

Kathy Eismont, McGraw Hill Education (US)

Andrew Lendnal, Morgan Stanley at Work (US)

Wendy Spears, Adobe Inc. (US)

10.2 Case Study—Making Conditional Share Awards Work for You and Your Employees

DESIGN AND STRATEGY

A not-to-be-missed session for anyone exploring ways of using Conditional Share Awards (CSAs) to reward global employees. Using a variety of company case studies, including BT's introduction of 'yourshare' with an award of shares to 101,997 employees, this panel of experts will look at the diverse approaches taken to awarding CSAs. Since 2020 and the impact of the COVID-19 pandemic, companies have been extending their existing employee share plans to include CSAs as a way of rewarding larger groups of employees.

This session will explore reasons for introducing awards and different strategies for setting eligibility criteria, how employees receive and accept awards, the length of vesting and holding periods, the treatment of leavers and country specific variations. An important part of any new plan involves communicating effectively to employees and the panelists will share examples of CSA documentation used in practice, highlighting key messaging topics. This discussion will compare and contrast the plans, how company objectives influenced their design and challenges faced along the way. Attend this session to hear how you can add CSAs to your employee share plans!

Ian Cox, Equiniti (UK)

Jennifer Rudman, Equiniti (UK)

Anna Watch, BT Group PLC (UK)

10.3 Intense Scrutiny of CIC Arrangements: Importance of Attention to Detail

EXECUTIVE PAY

With more consolidation looming on the horizon, join this session to explore the latest trends in change in control (CIC) benefits, including severance, equity awards, and excise tax protection arrangements. Featuring data from 200 companies across ten industries from the Alvarez & Marsal and Equilar's Executive CIC Report, this panel will examine industry differences in CIC provisions and highlight where dramatic shifts have been noted in recent years. With rich experience both on the acquirer and target



sides of a deal, the panelists will share their "lessons learned" and suggestions on how to expertly navigate tricky M&A transactions, including how to avoid potential CIC pitfalls for non-US employees.

Rob Casburn, Alvarez & Marsal (US)

Cherie Curry, FGE, Hilton Worldwide, Inc. (US)

Garry Devine, Horizon Therapeutics (US)

Allison Hoeinghaus, Alvarez & Marsal (US)

Breakout Series XI

11.1 Creating an Equity Compensation Culture

DESIGN AND STRATEGY

Like the strength of a house is dependent on the foundation upon which it is built, the stability, strength, and ultimately success of a company is dependent upon its cultural foundation. For an organization and its employees to be the most successful, a culture that includes an ownership stake is critical. So how does an organization build a cultural foundation that includes employee ownership? They lean-in to and own their commitment to employee ownership within their organizations. This compare and contrast session will feature two companies—Helios Towers and Software One, who are working to stabilize and strengthen their workplace culture with a resilient foundation built on employee ownership. Hear how equity played a critical role in the Helios Towers IPO journey and how Software One is taking the key learnings from its global share plan launch in 2020 to implement change to increase the plan take up rate to further demonstrate its commitment to employee ownership.

Sally Blanchflower, Tapestry Compliance (UK)

Jonathan Brooks, Helios Towers (ES)

Paul Fabiszak, Software One (ES)

Louise Feeney, Computershare (ES)

11.2 Who Is the Employer and Why Does It Matter?

BUSINESS INTELLIGENCE

In the past, most employees would live within a short distance of their work locations. However, due to technology, globalization, quick expansion requirements, and changes driven by the recent pandemic, many companies are now allowing, or considering allowing, employees to work remotely from almost anywhere. The answer to the question 'who is the employer?' has become more complex. The employer—or the entity benefiting from the employee's services—may not be the entity with which the employee has a contractual arrangement. The tax implications of this can be significant. Attend this session as the panelists review the concept of the "employer" from the income tax, social tax, legal perspective, and more! Join us for this invaluable discussion and learn best practices as well as common pitfalls if the current environment has you wondering who really is the employer and why does it matter!



Denise Glagau, Baker McKenzie (US)

Marlene Zobayan, FGE, Rutlen Associates (US)

Christine Zwerling, Twilio (US)

11. 3 Management Insights and Equity Programs

BUSINESS INTELLIGENCE

A consistent challenge for equity teams is the sheer time and effort it takes to prepare meaningful information describing the effectiveness of their corporate equity programs. If you find yourself in this quandary, be sure to join us for an in-depth look at how companies can set-up process automation to collect and store disparate data from various HR and equity sources and drive powerful data analytics and visualizations to achieve strategic change within their business. Attendees to this session will learn how to move from having limited understanding of HR compensation program effectiveness to efficiently drawing management insights from various employee compensation programs.

Matthew McKittrick, Moss Adams (US)

Frances Turalba, Amazon (US)

Billy Vitense, Starbucks (US)

Breakout Series XII

12.1 Not Your Typical IPO: Developing Trends in Public Offerings

TRENDING NOW

Today's crop of companies aspiring to a public listing aren't following the same old playbook for IPOs. With the upswing in direct listings and Special Purpose Acquisition Companies (SPACs) there is a clear shift in the balance of power, resulting in creative and new approaches to equity compensation treatment in a public listing. Join this panel to learn about these new trends and how these companies get to, through, and beyond IPO. Included in this discussion are how the different types of IPOs—traditional, direct, and SPAC—compare and contrast. The panel will also address the benefits different IPOs can deliver to both employees and employers, as well as what two recent alternative IPOs wish they had known before the process started. Attend this session and be prepared for your potential IPO!

Randy Murphy, Airbnb (US)

Ryan Ross, Aon (US)

Carl Stegman, Fidelity (US)

12.2 Somewhere over the Rainbow! Equity in the Post Pandemic World—Is There a Pot of Gold?

TRENDING NOW



As various parts of the world emerge from the COVID-19 pandemic lockdowns, vaccines roll out, and we all adjust to a "new normal"—what does our new world look like? There has been an increased focus on employee well-being but will this continue to evolve as we return to the workplace? Work life balance has changed with a "day at the office" often becoming a "day at the dining room table," will we ever return to a traditional office environment? How will these changes impact our broader HR practices like recruitment and retention of talent? More importantly, how do we keep our workforce connected and collaborative? And last but not least, how does all of this impact our equity compensation world? So many questions and so much to still discover. Join these four issuers as they share their insights and perspectives and a wealth of knowledge and experience from different industry segments, and from the four corners of the globe—Hong Kong, US, Israel, and Germany—with unique challenges from their region, differences in experience as they emerge from the pandemic, and if indeed there is that elusive pot of gold at the end of the rainbow!

Matthew Connor, FGE, Lucid Motors (US)

June Davenport, Morgan Stanley at Work (ES)

Yael Elbaz Roiter, FGE, AppsFlyer (IL)

Dr. Adie Leung, FGE, Citi (HK)

Tim Luther, Delivery Hero (DE)

12.3 Building a Stable and Sustainable Operating Model for Equity Program Management

PROGRAM MANAGEMENT

Offering a global employee share purchase program seems to be one of these giant projects that HR organizations look at or even fear. But in the end, a well-designed, professionally administered, and appealingly communicated program might be the game changer when it comes to employee engagement, loyalty, motivation, or even recruiting of the best-in-class employees. In this session, the panelists will provide insights into building a sustainable operating model for global equity programs. They will show and discuss the well-established infrastructure that the Equity Services Team of the Siemens Global Business Services Unit has built and is running in parallel for 72 different global plans. Join in for some fun facts, as these presenters, true patriots of employee share ownership, demystify equity administration and communication for you. If you are planning to implement a program or if you are looking for improvements in your plan management, you will not want to miss this session!

Leonie Mayer, Siemens AG (DE)

Simone Schmitt-Schillig, Unequity (DE)

Breakout Series XIII

13.1 Overcoming the Barrier: Building Cross-Department Connections

COMMUNICATIONS



When having conversations with your financial reporting partners, does it sometimes feel like there is a communication barrier? Do your conversations seem like they are going nowhere? If so, join this panel of experts as they help bridge the gap between Human Resources, Executive Compensation, Financial Reporting, and other departments. The panelists will discuss compensation expense, deferred tax assets, and dilutive EPS in simple terms. As you "cross the border" and learn more about accounting and reporting, they will share lessons learned and best practices for strong and efficient cross-department communication, including tried and true tips and techniques directly from Texas Instruments and Charles River Laboratories that you too can use to fluently speak to your colleagues!

Brian Arrington, Texas Instruments (US)

Raenelle James, Equity Methods (US)

Tommy Swindle, FGE, UBS Financial Services (US)

Ryan Trent, Charles River Laboratories (US)

13.2 Payroll Challenges for Globally Mobile Employees

FINANCE, TAX & ACCOUNTING

There is settling the equity award and then there is getting the reporting and withholding correct across the US and around the world. Join this panel of experts as they discuss the top challenges they have conquered in mobility equity reporting and working with payroll teams. Learn which locations around the world they have found to be more difficult in terms of processing awards and dealing with payroll. Hear what some of these issues were and how they were solved, as well as tips and tricks on how to handle these more effectively. Attend this session for an in-depth look at mobile equity and payroll.

Lynn Carbo, Global Tax Network (US)

Tara Hagen, Global Tax Network (US)

Andrea Kagan, NVIDIA (US)

Shokiah Williams, Wish (US)

13.3 Making Waves with a Global ESPP—Top 5 Challenges of a Global Employee Stock Purchase Plan

DESIGN AND STRATEGY

A global employee stock purchase plan (ESPP), operating across multiple countries and even continents, can be a key pillar in fostering an aligned company culture and having productive, engaged employees. Managing an ESPP across borders can add complications though, and you need the right strategies and processes to rise to the challenges they create. Any great plan design will need to consider regulatory issues across different jurisdictions, how to educate the global workforce about the benefits of the plan, different taxation rules and how they impact a global plan, the expense of the plan and if it's affordable to a broad base of employees, and how efficiently the plan can be run, and what costs will it incur. If you want to learn more about how to operate an ESPP across international borders, join these panelists for this informative session.



John Bagdonas, Global Shares (US)

Karen Curry, Elementis Global (US)

Annica Lau, LPKF Laser & Electronics (DE)

Breakout Series XIV

14.1 New Horizons: Social Justice, D & I and ESG Agenda...Charting the Course to a Better Future

TRENDING NOW

With huge shifts in the broader social justice agenda and no handy playbook to fall back on, what should companies be considering to ensure they stay ahead of the curve in the important areas of corporate social responsibility, D & I and ESG? This experienced panel will expertly breakdown this big question, bringing the debate back to those all-important take-aways you can apply to the design of your global share plans. The panelists will discuss these monumentally important topics as they relate to equity compensation and what you need to know to chart your course for a better future!

Janet Cooper OBE, FGE (UK)

Bjorn Hinderlich, Mercer (DE)

Marcus McEvoy, Computershare (ES)

Peter Newhouse, Unilever (UK)

14.2 You've Got a Hold on Me!

DESIGN AND STRATEGY

Companies are becoming well acquainted with the benefits associated with having holding periods as a design feature of their LTI plans. While there are many benefits to granting equity compensation with a holding period there can also be challenges to implementing such a plan globally. This expert panel will discuss the benefits of holding periods, the various ways to structure those holding periods including the pros and cons, and considerations for global grants. Join this informative session and learn everything you need to know to "really get a hold" on holding period design!

Blake Eisenberg, Aon (US)

Matthew Hunter, Tapestry Compliance (UK)

Jessica Ursel, C.H. Robinson (US)

14.3 Unpacking APAC—Tackling Troublesome Tax and Legal Issues

FINANCE, TAX & ACCOUNTING



Whether you're a small private company or large multinational public company, equity offerings in the APAC countries can be tricky. Attend this session as the panelists tackle the most difficult tax and legal issues that companies face with implementing and maintaining their equity programs in the APAC region, including China SAFE, Vietnamese exchange controls, Philippines and Japanese securities filing requirements, and more. This expert panel will discuss the strategies for handling these troublesome issues or navigating around them. You'll come away with a better understanding of the key compliance issues to look out for in the APAC countries; how plan design can impact the compliance burden; and best practices for achieving and maintaining compliance with some of the most challenging tax and legal requirements in the APAC region.

Lynn Atkins, Alexion Pharmaceuticals (US)

Susan Garvin, GoPro, Inc. (US)

Lindsay Minnis, Baker McKenzie (US)

Jeff Xu, Baker McKenzie (CN)

Breakout Series XV

15.1 "Say Hello, Wave Goodbye"—Tackling Global Issues Relating to Joiners and Leavers

LEGAL/REGULATORY

Joiners and leavers raise a number of practical and regulatory issues for companies when operating their equity plans globally. This experienced panel will discuss some of the complex and delicate issues encountered when employees join or leave companies via circumstances such as buy-outs, competitive activity restrictions, retirement and redundancy, as well as address how companies deal with the different local laws impacting these issues whilst maintaining a globally consistent approach. Attendees will hear practical approaches to addressing global due diligence in these areas, balancing risk management and simplicity of design, how to approach documentation to maximize enforceability, and some important lessons learned only from experience. If you need to learn how to "say hello and wave goodbye" to your global equity plan participants, make sure you don't miss this insightful session!

Chris Fallon, Tapestry Compliance (UK)

Hannah Needle, FGE, Tapestry Compliance (UK)

Ita Shaughnessy, Jupiter Asset Management (UK)

Julie Shepherd, FGE, The Sage Group (UK)

Claire Sykes, Rolls-Royce (UK)

15.2 A Million Different Pieces—Don't Let the Complexities of an M&A Transaction Impede the Outcome

PROGRAM MANAGEMENT



A multitude of factors determine the success of a complex M&A transaction. The project manager's role is to ensure the project is delivered on time, within budget and as expected by the project sponsors. And a quick search of "project management for beginners" online, will get you an overwhelming 133 million results! Join this panel of experts who will make the complex simple. Learn the key attributes of a good project manager and what it takes to succeed. Explore a real-life example of what was required to manage one of the most complex transactions of 2020—a corporate action on a large multi-ticker equity plan. This session will help you understand project management terminology, learn why some projects succeed while others fail, discover easily accessible resources and tools for project management, and build your confidence working in project environments.

Sean Hiera, UBS (US)

Dan Shickler, Stock & Option Solutions (US)

Michael Wallace, Raytheon Technologies Corporation (US)

Lisa Wilkes, UBS (US)

15.3 A Change Is Gonna Come—How to Embrace Change and Make It Work for Your Business

TRENDING NOW

It's fair to say that over the past year we have all experienced a period of significant change in just about every aspect of our lives. In the corporate world those changes can mean very significant challenges for organizations and their suppliers. In this session, this panel of experts will look at the corporate changes happening across industries over the last extraordinary year and discuss what that means for organizations and how they should embrace it. By the end of the session, you'll leave with a better understanding of the current landscape of corporate change as well as the key factors you'll need to consider to ensure successful business transformation.

Nicola Carroll, Rolls-Royce (UK)

Lucy Hovland, Deloitte (UK)

Lauren Kushner, Stitch - A Deloitte business (UK)

Breakout Series XVI

16.1 Understanding the Participation Decision

DESIGN AND STRATEGY

We all know the key to the success of an employee stock participation plan is high participation. And the key to getting high participation is understanding what drives the participation decision for your employees. Drawing upon new research conducted by Computershare in partnership with the University of Melbourne, this session will look at what the key factors are that affect an employee's decision to participate—from the time it takes for employees to make their participation decision to the correlation between tenure and participation. This research-based presentation sheds new light on the process by which employees make their participation decision, the reasons for not participating, and what you can do



to drive better interest in your own plans. Join this exciting panel as they reveal what you can do to encourage greater participation in your plan(s)!

Ritu Gupta, Computershare (CA)

Sandra Sussman, FGE, SAP (US)

16.2 Current Issues in Equity Compensation

TRENDING NOW

2020 and 2021 brought major changes to the daily work of equity compensation professionals. Market volatility created by the pandemic and other macroeconomic and social factors led to broken equity incentives, share pool volatility, and a host of new challenges to overcome. Compensation professionals have had to modify awards, exercise discretion in awards, conform to new HCM disclosures, and embrace the rise of ESG considerations. On top of these considerations, layer in regulatory and political agendas and you have a perfect storm of influences that will reign for many years to come. Join this expert panel as they explore the major issues that stock administration, accounting, and executive compensation professionals are grappling with in the current work environment, and look forward to what may transpire in 2022.

Nathan O'Connor, Equity Methods (US)

Robert Slaughter, Morgan Stanley at Work (US)

Lou Taormina, FW Cook (US)

16.3 Chopped: Cutting Back Your Equity Charges

FINANCE, TAX & ACCOUNTING

Everyone loves a good discount code, so we're here to share some discount codes for your equity awards! Equity awards are great, but the accounting charge is often higher than anticipated. Lowering the accounting fair value can mean less financial statement expense and/or more awards to employees. In this session, you'll discover how to save on your equity awards using a variety of design levers, including techniques like setting tough but fair performance goals, adding post-vest holding periods or performance underpins value caps, and optimizing valuation assumptions. Don't pay full price for your equity awards, get the discount code!

Sian Halcrow-Wilson, FIT Remuneration Consultants (UK)

Robert Lam, LSEG (UK)

CJ Van Ostenbridge, Infinite Equity (US)

Breakout Series XVII

17.1 Equity and Mobility Just Got BIGGER! From the Frontlines to the Home Office of Work Anywhere

Finance, Tax & Accounting

Dealing with a mix of employee locations during a pandemic was nothing short of challenging as companies around the world moved to institute, at lightning speed, compensation policies for the front line at stores, distribution centers, laboratories, and manufacturing facilities, while also supporting their new remote workers as well as the existing workforce on international assignments. Remote workers at all levels introduced a whole new level of mobility compliance, turning many local participants into mobile participants overnight. Attendees to this session will hear stories direct from the front line—learning how these top, global companies weathered and persevered through the pandemic challenges. Key takeaways include hearing how these teams collaborated with key stakeholders and suppliers, embraced technology to help, and reacted to current market activity to address company and business needs during this difficult time.

Leann Balbona, FGE, KPMG (US)

Lori Feller, Eli Lilly & Company (US)

Margie Molesso, Walmart, Inc. (US)

17.2 Global Plans—Common Mistakes and How to Avoid Them

LEGAL/REGULATORY

Many companies operate stock plans of all shapes and sizes, all-employee or executive level, and global plans in particular pose significantly more challenges. Join this experienced panel for a practical look at the obstacles companies face with global plans. Join us and learn how to overcome common issues and what lessons to learn in the process. This panel will address important areas you should consider to ensure your company's success including topics such as: 1) Is consistency really key—does your plan work well away from home and what to do if not; 2) the decisions behind what awards to offer (incentive effect, tax treatment and stock vs. cash considerations); 3) speaking the language—when should plan documents be tailored to the local audience; 4) compliance when balancing budget and risk and 5) how to effectively and efficiently administer your plans around the globe.

Mike Cheesley, Reckitt Benckiser Group (UK)

Anna Fletcher, Rentokil Initial (UK)

Hannah Needle, FGE, Tapestry Compliance (UK)

Sonia Taylor, Tapestry Compliance (UK)

17.3 Your Options for Donating Options...and Other Employee Shares: The How-to Guide

BUSINESS INTELLIGENCE

Join this panel of experts to learn the "ins and outs" of charitable donations of employee shares. Regardless of whether your company wants to focus on releasing value from forgotten or 'nuisance' share holdings or facilitate broader scale share donation option for your employees, these panelists will highlight



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for attendees the important nuances of charitable giving of employee shares. Not all forms of equity compensation present the same charitable planning opportunities and employee shares are often overlooked as a source of charitable donation, largely due to the complexity of the process. This session will ensure you are well equipped to help your employees navigate this important concept and are ready to provide them with their "options" for charitable giving!

Jose Anaya, Overflow.co (US)

Krista Glatthaar, Fidelity Charitable (US)

Gabbi Stopp, ShareGift (UK)