

IMPORTANT: The details in this document are subject to change. Please visit [GEO's website](#) for current session information. Last updated 10 March 2023.

Operational Effectiveness

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Carrick

1.1 Automating Administration for Mobile Participants

As equity extends to an increasing number of employees within organizations, stock administration teams are challenged with the administrative and compliance challenges associated with a higher number of mobile employees.

As a larger mobile population inevitably leads to a need for automation, this session shares the experiences, war wounds, hints and tips for automating systems, administrative processes and third-party support.

- Find out how to overcome company data challenges such as missing data, the lack of clean data, and managing global data entry
- Discover how best to communicate to employees about the impacts of mobility on their equity awards
- Understand the 'payroll black hole' and the role equity plays in payroll processing to ensure compliance

Gemma Ludwig, Vialto Partners (UK)
Simona Paduraru, Google (US)
Tyler Huff, Vialto Partners (CH)
Peter Kontara, Uber (US)

Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Harris

1.2 Combating Wage Compression with Equity Compensation

With greater pay equality come greater pay challenges. The latest is wage compression.

Join this insightful session to gain a better understanding of what wage compression is, and how it can negatively affect pay equitability and employee engagement. Learn how equity compensation can help where there is no budget to offer raises. Hear from this panel of experts as they examine external factors, internal issues, and discuss an issuer case study. Come away with ideas on what you can do with your equity compensation program to counteract wage compression.

- Gain a better understanding of wage compensation and how employee engagement can be affected by it
- Learn the impact equity compensation can have on your employees
- Hear a case study that examines both external factors and internal issues and brainstorm ways you can manage your equity compensation program

Edward Hauder, Exequity LLP (US)
Vanda Kiss, Nokia (HU)
Britta Puschendorf, FGE, Morgan Stanley at Work (US)
Deidre Salisbury, Infinite Equity (US)
Tami Bohm, Radian Group (US)

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Trending Now

Field of Study, Level: Specialized Knowledge, 0
Location: Level 0, Tinto

1.3 The Strategic Role of Employee Share Plans in the War for Talent

The war for talent is a pressing topic for many organizations, as they look to attract and retain the right talent to take their business forward. Increasing globalisation has widened the talent marketplace in recent years, and this together with the challenges of cost-of-living crisis, post-pandemic recovery and the ongoing conflict in the Ukraine, has created an environment where the workforce is re-evaluating priorities, and we see trends such as the widely reported 'Great Resignation' emerge.

In this session, we hear from two companies who have recently introduced new broad-based employee share plans, designed to reward employees for their input in driving growth, and incentivise all to play a part in increasing share value.

- Hear how plan structures can form a key part of the recruitment and retention employee value proposition
- Discover how share plans create a sense of corporate community for a global employee-base for which remote and hybrid working patterns are becoming the 'norm'
- Consider the place of contributory share plans in the current economic climate, sharing views on how to balance short-term cashflow needs and longer-term financial wellbeing

Suzannah Crookes, Tapestry Compliance Limited (UK)

Rakhee Patel, SThree plc (UK)

Louise Feeney, Computershare (UK)

Finance, Tax and Accounting

Field of Study, Level: Taxes, II
Location: Level 1, Ochil

1.4 Beyond Country Borders: Addressing the Impact of State, Provincial and Local Taxes

With remote work on the rise, and an increasing focus on compliance, it is important for companies to track their employees and assess the correct taxes at the national, regional and local levels - particularly where a trailing tax liability on former residents is imposed.

Although much attention is given to country-level taxes, in many countries, there are significant state, provincial and municipality tax implications which should not be ignored.

The panel will also explore regional variances of employee taxation and employer paid taxes, such as state payroll taxes in Australia.

- Discover the differences between national-level taxation and state, provincial and local taxes in key countries
- Understand the 5,000 local taxes currently valid in the US
- Compare the US state-level taxation framework with regional taxation in other countries such as Canada, Sweden, China and Switzerland

Suzie Bentley, NVIDIA Corporation (US)

Marlene Zobayan, FGE, Rutlen Associates (US)

Tara Hagen, Global Tax Network (US)

Lee Stevens, NVIDIA Corporation (UK)

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Operational Effectiveness

Field of Study, Level: Specialized Knowledge, II
 Location: Level 0, Moorfoot

1.5 Scaling Mobility: New Workforce Arrangements and Global Expansion

How does your company determine who is mobile? With work arrangements ever-changing, employees working anywhere, remote, hybrid, moving locations or back in the office; mobility matters.

These companies have focused processes and efforts around compliance, process and operational effectiveness that scales the mobility population and global footprint growth. With limited resources and shortened turnaround times, collaborating with your service providers and local stakeholders becomes paramount.

This panel explores how these companies have defined mobility, what is on the horizon and how they are tightening up processes to scale and address shorter turns.

- Understand how companies are defining mobility and scaling their equity rewards
- Get a global, EU and US perspective on how best to scale up
- Hear lessons learned from both corporate issuers and service providers

Leann Balbona, FGE, KPMG, LLP (US)
 Eveline Franceschi-Kuhn, Nestle (CH)
 Vickram Paliwal, KPMG, LLP (CH)
 Michael Stevens, Oerlerlikon (CH)

Operational Effectiveness

Field of Study, Level: Specialized Knowledge, I
 Location: Level 0, Kilsyth

1.6 Global ESPP Design and Administration Best Practices

To grow and compete for top talent, many companies are expanding their employee stock purchase plans (ESPPs) globally.

A panel of senior-level representatives from Cummins, Snowflake, and SAP will share tips and lessons learned from their experience of designing and managing large global ESPPs that include insights around optimal plan design, expanding ESPPs to new countries, regulatory issues, employee engagement, communications, and measures of success.

- Hear three global issuer case studies that demonstrate best-in-class ESPPs
- Get information and guidance that will improve your global ESPP offering
- Post your questions to the panel through an interactive Q&A and audience polls.

Tommy Swindle, FGE, UBS Financial Services Inc. (US)
 Sandra Sussman, FGE, SAP (US)
 Ciara Sowell, Cummins Inc. (US)
 Donna Hammer, Snowflake Inc. (US)

Finance, Tax and Accounting

Field of Study, Level: Specialized Knowledge, II
Location: Level 1, Platform 5

1.7 Payroll and Equity: How to Achieve Global Equilibrium

Payroll deadlines and regulations are unconcerned by an employee's country or jurisdiction. Money movement needs to be on time and non-compliance attracts penalty fees. In many cases, reporting timing and needs are easily addressed by frequent communication with international stakeholders and output adjustment. This expert panel will discuss questions such as: What level of education do each international stakeholder need? Is the payroll system for international jurisdictions set up for equity compensation needs, rather than just salary? How do you identify risks before they arise and maintain an 'international payroll playbook'?

- Find out how to support payroll teams indifferent jurisdictions
- Discover how to achieve accurate data management for equity and salary
- Find out how to create and maintain a playbook of processes and resources to communicate to payroll stakeholders across jurisdictions

Greg Fox, SNAP (US)
Ben Ramos, Charles Schwab (US)
Fiona O'Donnell, Horizon Therapeutics (US)

Legal and Regulatory

Field of Study, Level: Business Law, III
Location: Level 0, Tinto

2.1 Changes to 10b5-1 are on the Doorstep

The SER has announced that the final rule changes to 10b5-1 will be released this April. Don't let this long-awaited, and long-anticipated, rule change catch you, and your company's employees, unaware. Join this session for a timely and thought-provoking discussion that will prepare you for the changes.

- Hear details of the proposed amendments from the experts
- Understand how the changes might affect your company and executives
- Come away with the knowledge and tools to take action

Rich Baker, Morgan Stanley at Work (US)
Matt Connor, Lucid Motors (US)
Veronica Wissel, Davis Polk & Wardwell LLP (US)

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Finance, Tax and Accounting

Field of Study, Level: Specialized Knowledge, II
Location: Level 1, Carrick

2.2 The Equity Debate: Which Country has the Best Tax-Advantaged Plans?

Which country do you think offers the best all-employee, tax-advantaged plans? You decide! Join the debate as each of our speakers advocates for why their country is the best.

This interactive session allows you to ask the panelists questions before using polling software to cast your vote.

- Hear qualified plan over views from the US, France and the UK
- Discover each country's tax advantages, administration requirements and participant experience
- Take four opportunities to cast your vote to decide which country's offer is best!

Agnès Charpenet, Baker McKenzie (FR)
Jeremy Edwards, Baker McKenzie (UK)
Don-Tobias Jol, Baker McKenzie (NL)
Brian Wydajewski, Baker McKenzie (US)

Private and Pre-IPO Companies

Field of Study, Level: Specialized Knowledge, II
Location: Level 1, Harris

2.3 IPO Hangover: Plan Operations that Reduce the Morning After Headache

Public event readiness focuses on the actions leading up to the 'Big Day'. But what happens after that day comes and goes?

This session provides advice on how to avoid an IPO hangover. The panel of experts will cover the items that tend to get lost in the shuffle or deferred in the frantic run up to the public event.

Understand the key milestones and steps you can take now to guarantee a pain free transaction

Learn which administrative tasks, controls and communications are essential to succeed

Identify the key stakeholders and how best to communicate with them

Chris Dohrmann, Global Shares - a J.P. Morgan company (US)
Ramon Dominguez, Lucid Motors (US)
John Baker, Equiniti (US)
Yael Elbaz-Roiter, FGE, AppsFlyer

Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Ochil

2.4 The Tale of Two All-Employee BAYE Plans

It's a tale as old as time - two companies from two very different backgrounds, not destined to cross paths but for their one common interest...their all-employee global buy-as-you-earn (BAYE) plans.

This session will take you on a journey from start to end, setting the scene with Janus Henderson's long-established BAYE, and concluding with a new star on the scene in the form of Dr. Marten's all-employee offering following their 2021 IPO.

Follow their stories to hear how these plans work in their home countries and internationally, how they are used differently to make their employees shareholders, and how to avoid common issues.

- Hear when, where and why the companies chose BAYE plans
- Discover the solutions to the challenges encountered when launching their plans globally
- Find out how the plans are being kept relevant and up-to-date, reflecting changes in group structure and market practice

Sally Blanchflower, Tapestry Compliance Limited (UK)
Matthew Hunter, Tapestry Compliance Limited (UK)
Shelly Ribbons, Janus Henderson (UK)
Sarah Steadman, Dr. Martens (UK)

Data and Business Intelligence

Field of Study, Level: Specialized Knowledge, 0
Location: Level 0, Moorfoot

2.5 Global Equity Insights Survey 2023

Now in its 11th consecutive year, the Global Equity Insights Survey is the longest standing survey of global equity plans with participation of nearly 200 companies worldwide annually.

Join this session in 2023 to learn about the latest developments in equity plans from an administration and communications perspective for both Long-term Incentives and Share Purchase Plans. Each year, new focus topics based on market developments are added, so don't miss out on the latest insights regarding the war for talent and a clear focus on developing capital markets, including inflation, the energy crisis, and other economic drivers.

The session will touch upon the following key areas:

- Long-term incentive design
- Share purchase plans
- Focus on talent
- Focus on capital markets including inflation and other economic drivers

Andrew Thain, hkp// group (DE)
David Voggeser, hkp// group (DE)
Sebastian Wetzel, Siemens Energy (DE)
Sandra Sussman, FGE, SAP (US)
Sheila Frierson, Computershare (US)
Mitan Patel, FGE, Fidelity (UK)
AmyLynn Flood, Vialto Partners (US)

Trending Now

Field of Study, Level: Specialized Knowledge, 0
Location: Level 0, Kilsyth

2.6 Stop The Quiet Quitting: Using Equity to Adapt to Market Forces

The numerous and unique world events that have occurred over the last few years have led to an unpredictable business climate, but one that has presented a myriad of opportunities, particularly for the equity industry. In this moderated session, we will take a deep dive into how equity can be used as a tool to adapt, and even counteract, many of the phenomena currently happening in the market and in the workplace with a focus on inflation and quiet quitting.

- Access industry research that underpins best practices in the creative use of equity to retain and motivate top talent and help participants hedge against broader market and governmental forces
- Hear how specific issue and administrator communication strategies can help equity to combat market forces
- Understand the role that demographics such as age and gender can significantly shift the ways in which equity should be deployed as a tool

Bill Castellano, Rutgers University (US)
Julie Vander Veen, UBS Financial Services Inc. (US)
Jackson Vaught, UBS Financial Services Inc. (US)

Data and Business Intelligence

Field of Study, Level: Specialized Knowledge, II
Location: Level 1, Platform 5

2.7 Leveraging Automation to Save Your Sanity!

Data management is not just about robots; automation needs to work.

Improving or adding automation such as scheduled reporting, automated codes, and creating groups can help transform the efficiency of a department. These items are even more important with the added complexity of global locations and mobility.

This expert panel will share tips that can help you organize information and analyze data for improved processes and decision making.

- Learn how to gather timelier and more accurate information that minimizes risk
- Enjoy greater reporting and reconciliation from independent administration systems
- Hear how to tailor your processes to your instruments, current systems, and team strengths.

Anthony Bove, Charles Schwab (US)
Andrea Kagan, NVIDIA Corporation (US)
Garry Devine, Horizon Therapeutics (US)
Andrew Gorder, Moss Adams (US)
Adva Lewitte, ShareForce (UK)

Employee Engagement

Field of Study, Level: Business Law, 0
Location: Level 1, Carrick

3.1 Equity Engagement Strategies: A Dose of Insight and a Measure of Creative Freedom

The success of a share plan is underpinned by the way it is communicated. This session will dive into how best to engage with employees using a variety of case studies. The creative panel will share how you can bring your plans to life using a dose of insight and a measure of creative freedom, as well as looking into what the future holds.

- Explore effective strategies to communicate with your workforce when launching international employee share plans.
- Examine examples of communication materials, the use of microsites and Apps
- Hear case studies that demonstrate effective communications

Dominic Harrison, Equiniti (UK)
Jade Jordan-James, Equiniti (UK)
Jonathan Sturman, Kier Group PLC (UK)

Employee Engagement

Field of Study, Level: Communications and Marketing, 0
Location: Level 0, Tinto

3.2 The Culture Club: How Effective is Share Ownership?

How can companies foster an employee ownership culture that aligns interests, and creates a loyal, cooperative, and productive workforce, particularly in times of economic downturn and uncertainty? This session explores ways companies have used share schemes to engage employees to make them feel and act like owners of the company they work for.

- The panel will illustrate the plans they have in place, share the success stories, pitfalls and lessons learned
- Discuss whether we are returning to an era of 'Cash is King' and if equity is viewed as just another benefit
- Discover how companies are dealing with rising inflation and energy costs and the impact on how employees view equity ownership

David Edwards, Natwest Bank (UK)
Miguel Navarro, Telefonica (ES)
Navjeet Rosenthal-Gill, PwC (NL)

Operational Effectiveness

Field of Study, Level: Specialized Knowledge, II
Location: Level 0, Moorfoot

3.3 Operational Excellence: Automation and Data Driven Management

Automation makes a big impact on the overall efficiency of your organization, bringing advantages that include higher production rates and increased productivity. The same benefits of data-driven management can be enjoyed by your equity compensation team.

This session will focus on areas that drive operational excellence and clearly illustrate the value your stock plan can derive from implementing data driven principles.

- Deploy data visualization tools to improve the participant experience and education, reducing requests for assistance
- Discover how to reduce processing errors and improve participant experience, leveraging vendors where appropriate
- Leverage analytics process automation tools, streamlining repetitive monthly business processes, reducing errors and creating visual reporting and communications for senior leadership

Kody Adams, DOMO (US)
Alexy Armitage, AVEVA (UK)
Matthew McKittrick, Moss Adams (US)
Natalia Sablewska, Amazon (UK)

Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Harris

3.4 LTI Impacts of the GSK Demerger of Haleon: The EU's Largest European Listing This Decade

The GSK demerger of Haleon was a large and complex transaction that impacted around 21,000 participants. This session explores the critical issues impacting how GSK managed the impact on its LTI participants. Looking at key issues internationally, and some high-level considerations in 20 locations, you will hear how GSK went above and beyond to achieve the best outcomes.

- Understand the key design decisions for award holders
- Hear how the communications strategy translated and simplified complex demerger implications for participants
- Discover the key technical challenges, including global tax and operational complexities

Artur Jager, GSK plc (UK)
Giles Capon, EY (UK)

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Operational Effectiveness

Field of Study, Level: Specialized Knowledge, 0
Location: Level 0, Kilsyth

3.5 Participant Loyalty: Should Equity Compensation Plans Run Like a Retail Rewards Programme?

Most of us have a Starbucks Star account, Hilton Hotel points or Emirates Air Miles, so why aren't share plans incentivised in the same way? Can a new kind of plan design that encourages employee engagement through a points system increase participation?

This session explores innovative ideas in fostering employee stock plan engagement. The expert panel will look at the possibility of running stock plans like a loyalty program, with rewards and participation points baked into plan design and contributing to other benefits.

- Discover the types of plans that could accommodate loyalty rewards
- Find out how to structure a plan that includes participation rewards
- Explore innovative ways to communicate this plan to employees to encourage buy-in

Chris Dohrmann, Global Shares - a J.P. Morgan company (US)
Billy Vitense, Starbucks (US)
Blake Eisenberg, Aon (US)

Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Ochil

3.6 Key Considerations for 'Foreign' Plans in Canada, the UK and the US

With global employee populations on the rise, so is the demand for globally compatible compensation plans. As issuing various forms of equity compensation from foreign plans to employees becomes more common, it is important to carefully review the plans prior to issuance.

When expanding a share scheme into new territories, an appendix will usually suffice to ensure the plan meets the respective domestic country's tax efficient rules, but our panel has encountered some common issues affecting employees in Canada, the UK and the US.

- Understand the current taxation rules and issues which require close attention when reviewing foreign plans
- Discover simple fixes and discuss the issues that may not be possible to fix in each country
- Find out how to navigate new UK legislation to ensure the foreign plan is compliant

Jessica Pancamo, BDO US LLP (US)
Andy Goodman, BDO UK LLP (UK)
Andrea Bunbury, BDO UK LLP (UK)
Julie Hindley, Alpha FMC (UK)

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Finance, Tax and Accounting

Field of Study, Level: Specialized Knowledge, II
Location: Level 1, Platform 5

3.7 Top Tax Issues Impacting Global Share Plans

The growth of the global economy has resulted in a significant increase in the number of companies with employees across multiple countries, presenting employers seeking to implement global share plans with unique challenges.

In this session, the expert panel will cover the most significant tax issues impacting global share plans. Topics include how to avoid 'dry tax' situations, where 'sweet equity' works, how to avoid taxation of equity awards at ordinary income tax rates, and more!

- Explore common global share plan designs and their tax treatment in various jurisdictions
- Discover how to secure capital gains treatment for equity awards across jurisdictions
- Explore impacts on mobile workforces and common tax pitfalls that can arise in various jurisdictions

Louise Jenkins, Alvarez & Marsal Taxand (UK)
James Deets, Alvarez & Marsal Taxand (US)

Trending Now

Field of Study, Level: Communications and Marketing, II
Location: Level 0, Tinto

4.1 The Great... Reset? The Future of Work

The current economic and employment conditions are more complex than ever before. With the 'Great Resignation' and labour shortages plaguing 2022, this year's themes are recession and high inflation – a cocktail that significantly impacts companies' people strategies.

This panel of experts will discuss the latest hot issues companies are challenged with and how they are affecting their corporate culture and sense of purpose.

- Find out how equity teams are weathering the challenges of inflation and the cost-of-living crisis
- What the best employers are doing to attract, retain, incentivize and reward talent
- What the future of work looks like and its impact global employee and executive share plans

Janet Cooper, OBE, FGE, Industry Expert (UK)
Rosemary Lemon, Hays PLC (UK)
Yvonne Smyth, Hays PLC (UK)
Louise Sutton, AstraZeneca (UK)

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Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Carrick

4.2 I've got a plan, a French one!"

Adapting an employee stock purchase plan (ESPP) in France is a challenge because there is already an advantageous program in place: the employee savings plan.

This session will outline the various issues and meaningful insights to successfully launching an ESPP in France.

- Discover the main features of UK and US ESPPs, and French employee savings plans
- Find out how to design a plan that complies with French laws
- Get tips for effective communications and efficient plan administration

Orianne Achéritéguy, Deloitte Société d'Avocats (FR)

Mariya Vezarova, Hermès (FR)

Matthieu Gonbert, Banque Transatlantique (FR)

Trending Now

Field of Study, Level: Specialized Knowledge, 0
Location: Level 0, Moorfoot

4.3 Getting Creative: The Many Flavours of Performance Awards!

Market and performance awards have gained in popularity over the past few years and can take on many forms from Options to Restricted Stock, and TSR goals to individual sales goals. As popularity has gained traction, so has the complexity in the design features.

This session explores the ways companies have gotten creative with their award design for their global workforces, and the administrative and accounting implications. The expert panel will help you decide on the right metrics to use, and how to value, communicate and administer these complex award designs.

- Explore the types of performance and hybrid awards and the 'gotchas' to be aware of as you build out the final design structure.
- Discuss strategies in communicating the award design for a global population.
- Review the various valuation methodologies and financial reporting implications for market and performance awards

Garry Devine, Horizon Therapeutics (US)

Raenelle James, Equity Methods (US)

Michael Wallace, Raytheon Technologies (US)

Adva Lewitte, ShareForce (UK)

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Legal and Regulatory

Field of Study, Level: Personnel/HR, 0
Location: Level 1, Harris

4.4 Un-Loch the Latest Global Developments

You've got a ticket to Tapestry's 2023 infamous incentive plans global tour! The panel includes The Weir Group and Lucid Motors, who will share their insights on those tricky issues and help answer those all-important questions of what do issuers actually do in practice to navigate the developments.

This session will update you on what's changed since we were last together and focuses on how to operate your incentive plans compliantly across the globe.

- Gather essential legal, tax and regulatory changes around the world, including securities laws, foreign exchange and (everyone's favourite) tax developments
- Hear hot topics in (sometimes hot) countries, including Australia, Canada, Poland, the UK and (almost) everywhere in between!
- Discover due diligence – how to conduct it, how to be consistent with it and how to be compliant from it

Sally Blanchflower, Tapestry Compliance Limited (UK)
Matt Connor, FGE, Lucid Motors
Ian Gassner, The Weir Group plc (UK)
Matthew Hunter, Tapestry Compliance Limited (UK)

Trending Now

Field of Study, Level: Business Law, 0
Location: Level 0, Kilsyth

4.5 Around the World in 50 Minutes: Global Tax and Legal Updates

Discover the latest key tax and legal developments and trends impacting global share plans. As well as hearing experienced issuers from Amazon and Uber speak to their experiences, the panel will provide a wealth of knowledge and helpful guidance so that your company and employees are best positioned to navigate and address changes.

- Discover the most relevant legal, regulatory and tax updates impacting equity compensation in countries around the world
- Hear practical solutions from Amazon and Uber in response to recent global equity developments
- Get an understanding of possible future equity developments and practical tips to help you address them

Peter Kontara, Uber (US)
Lindsay Minnis, Baker McKenzie (US)
Aimee Soodan, Baker McKenzie (US)
Kelley Garrett, DoorDash (US)

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Operational Effectiveness

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Ochil

4.6 Let's Talk Equity! Emerging Practices in Equity Compensation

Do you need advice on the best and the emerging practices in equity compensation?

This interactive 'talk show' session is delivered by an expert panel known for tackling tricky problems, sourcing elusive data, and sharing their advice and experience on issues that lie ahead.

- Debate the pros and cons of various equity practices including pay equity
- Find out what's happening with vesting and the emerging role of social media to connect employees and equity awards
- Discover what volatility and an economic downturn means for your equity plans

Emily Cervino, FGE, Fidelity (US)
Cherie Curry, FGE, Hilton Worldwide (US)
Robyn Shutak, FGE, Infinite Equity (US)
Sandra Sussman, FGE, SAP (US)

Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Platform 5

4.7 Aramco: Sharing the Secrets of an Award-winning Stock Plan

Everyone loves a good success story. From discovering the work that went into it, decisions made, paths followed, mistakes and lessons learned from, and the result ultimately achieved – it's engaging stuff. In this session you will hear directly from Aramco as they share details around the implementation of their company-wide share plan, which launched in 2020 and went on to win the 'Best Use of a Share Plan in an Emerging Market' award at the 2022 GEO Awards. From plan design through to how participation boosted performance, this promises to be a truly insightful session.

- Find out how to design and implement an award-winning all-employee share plan
- Learn about the launch and communication of the plan and how it attracted participation
- Find out how success was measured, monitored and reported

Matthew Neuman, Aramco (SA)
Barry McKernan, Global Shares - a J.P. Morgan company (ES)

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Private and Pre-IPO Companies

Field of Study, Level: Personnel/HR, II
Location: Level 0, Tinto

5.1 To IPO or not to IPO, that is the question!

For companies that are choosing whether to remain privately held, become a special purpose acquisition company (SPAC), or go public, there are design, regulatory requirements and tax implications that must be considered for employee stock plans.

This case study-based session considers the choices companies have at each company life stage and how these impact equity compensation.

- Uncover the best plan designs for each company life stage
- Discover how to manage liquidity events
- Hear from WeTransfer, Stripe, and Edinburgh-based fintech FNZ, a UK unicorn-status company

Paul Arens, FGE, AST Private Company Solutions (US)

Miles Thomson, FNZ Ltd (UK)

Navjeet Rosenthal-Gill, PwC (NL)

Matt Maltby, WeTransfer (UK)

Jen Thomas, Stripe (US)

Employee Engagement

Field of Study, Level: Communications and Marketing, 0
Location: Level 1, Carrick

5.2 Epic Exchanges: Empowering Employees through Extraordinary Communications

What good are well-designed plans if they don't effectively grab staff attention, explain what is needed and deliver effective outcomes?

This session reveals how international firms have engaged their global staff across various events including LTI and Performance plan launches, corporate actions, and more.

- Discover how to empower employees with ownership
- Hear from communication specialists as they share the approaches that worked and why
- Discover how to work with your provider to understand and implement effective communication methods that help employees to thrive

Andy Forsythe, Unilever (UK)

Maya Wright, Iron Mountain (US)

Nigel McNeil, Fidelity (UK)

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Trending Now

Field of Study, Level: Specialized Knowledge, 0
Location: Level 0, Moorfoot

5.3 Where in the World are My Grantees? Equity Awards and Alternative Work Arrangements

The trend to hire globally based talent began well before the pandemic but has now become almost common place. Even large companies cannot always justify setting up local entities and hiring employees in a 'conventional' way, and are exploring alternative work arrangements, such as remote work, hiring consultants or hiring employees through a Professional Employer Organization (PEO) or Employer of Record (EOR). The tax and legal issues for granting equity awards, not to mention the administration of such awards, can differ greatly depending on the grantee's arrangement with the company.

This session shines a light on how US, UK and EU companies have tackled these challenges, examining the differences in communicating and documenting awards and provides an overview of the countries in which grants to indirect employees remain challenging.

- Explore the different service models prevalent in the market, with an emphasis on PEO and EOR arrangements
- Get an overview of the different tax and legal challenges for granting awards to individuals who are not employees of the issuer or a local entity in various countries.
- Hear solutions to the practical tax, communication and education challenges of administering awards granted to individuals engaged through an alternative work arrangement

Henry Cha, Velocity Global (US)
Jeremy Edwards, Baker McKenzie (UK)
Barbara Klementz, Baker McKenzie (US)
Shawn McIntire, Velocity Global (US)

Finance, Tax and Accounting

Field of Study, Level: Specialized Knowledge, II
Location: Level 1, Harris

5.4 Should You Walk 500 Miles for a Tax-Qualified Share Plan?

Some countries make a song and dance about their tax-qualified employee share plans. Other countries offer some great tax benefits but which are less shouted about. In this session we will discuss the countries where tax advantaged arrangements may be beneficial. We'll talk about the pros and cons of flexing global employee share plans to take advantage of different country tax regimes, including the high level of demands from some jurisdictions to qualify and managing bespoke arrangements globally. And we'll discuss what we see happening in practice and the extent of take-up. With share plan experts from Ireland, France and the UK, we'll include the following talking points:

- Whether companies are taking advantage of the relatively peaceful status of French tax-qualified share plans following years of frequent changes to the regimes;
- The market for tax-qualified plans in Ireland;
- Recent improvements to the UK tax-qualified share plans and how they can fit into global plans.

Eleanor Cunningham, McCann FitzGerald LLP (IE)
Thibault Jabouley, CMS Francis Lefebvre Avocats (FR)
Sarah McMaster, CMS Cameron McKenna Nabarro Olswang LLP (UK)

Trending Now

Field of Study, Level: Personnel/HR, III
Location: Level 1, Ochil

5.5 Supporting the CHRO through Times of Transformation: Equity and Organizational Management

Why get nervous in the storms of change when smartly leveraged internal resources can serve as a guiding compass? Whether M&A, IPO or major restructuring, the CHRO is tasked with navigating the transformation of the organization. With the support of compensation and benefits (C&B), the CHRO is in a unique position to provide organizational insights and strategic guidelines for the transformation.

This session details how C&B and equity experts can support the CHRO with their input, data, insights, and consulting capabilities? Join the expert panel to unpack the strategic CHRO toolbox and discuss examples of the various applications.

- Discover how C&B can significantly support the CHRO in strategic organizational development
- Delve into the CHRO's strategic toolbox that includes equity instruments
- Explore the data, insights and consulting capabilities that can be leveraged to contribute to strategic organizational decisions

Marc Muntermann, Siemens Energy (DE)

Markus Stebe, Siemens AG (DE)

David Voggeser, hkp// group (DE)

Renee Willhuber, Vitesco AG (DE)

Trending Now

Field of Study, Level: Specialized Knowledge, III
Location: Level 1, Platform 5

5.6 Incentivising and Integrating ESG into Employee Incentives and Equity Compensation

ESG is here to stay - and companies need to act. Incorporating ESG metrics into stock plan performance is a great way to make a meaningful impact, but how do you make sure you get it right?

This session will look at the practical challenges facing HR teams and provide five key components for effectively integrating ESG considerations and performance metrics into your stock plans and incentive arrangements.

- Learn whether an ESG incentive or consideration is right for your business
- Discover how to get buy-in from executive teams and drive accountability with all stakeholders
- Find out how to structure ESG metrics, measure performance and adjust for risk

Katie Crisp, Deloitte LLP (UK)

Gabbi Stopp, ShareGift (UK)

Martin Osborne-Shaw, Global Shares - a J.P. Morgan company (UK)

Operational Effectiveness

Field of Study, Level: Specialized Knowledge, 0
 Location: Level 0, Kilsyth

5.7 Technology Power Rangers

Does your technology have the power, capabilities and strength to flex and grow with your equity program? It may be time to place your technology on 'superpower mode'!

With the shortening of processing times, need for real time data, T+1 settlement time for stock options for SEC registrants starting in April 2024, this session will help you to consider and reduce the turnaround times, manual inputs, and touch points in your equity program processes.

The panel includes Best in Technology GEO Award winners who will share how they used automation to achieve operational effectiveness, streamline and validate processes, and manage compliance and risk for their equity programs. Bring your superhero cape!

- Hear best practice from Best in Technology GEO Award winners
- Understand current trends in automation and technology
- Take away suggestions and recommendations to streamline your equity program delivery

Sean Manahan, Fidelity (US)
 Zared Willard, KPMG, LLP (CH)
 Kim Woodard, Walmart (US)
 Donna Hammer, Snowflake Inc. (US)

Executive Pay

Field of Study, Level: Personnel/HR, III
 Location: Level 0, Tinto

6.1 Finding Fair: Scientific Approaches to Increase Fairness in LTI Allocations

While fairness has received a great deal of media attention, especially in connection with bonus payments, employees are increasingly questioning the allocation of long-term compensation. Valuable insights from the latest research in academia can be well applied to prevent unhealthy discussions of right and wrong in the office.

This session will dig deep into the concept of fairness and explore individual perception of compensation and more. The expert panel will highlight the specific implications for companies and the measures that can be taken for ensuring fair LTI allocations whilst giving a sneak peek into rigorous academic research.

- Discover what academia tells us about equity allocations: are they actually fair?
- Hear from Siemens Energy and hkp/// on how academic methods and practical tools can be applied in industry
- Explore the education and communication measures that contribute to ensuring fairness

David Voggeser, hkp/// group (DE)
 Sebastian Wetzel, Siemens Energy (DE)
 Michael Wolff, University of Göttingen (DE)

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Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Carrick

6.2 Supporting Life Changes with Equity Compensation

Reflecting on the adage, 'Life happens when you are busy making other plans', equity compensation must adapt to key life events.

This session addresses the treatment and consideration of share plans including changes from full-time to part-time work, leaves of absence, employment terminations due to retirement, reductions in force, death, disability, as well as changes due to divorce.

The expert panel will discuss the advantages, disadvantages, and considerations of various approaches to major life events affecting equity compensation plan participation.

- Hear an overview and legal and administrative implications of different approaches to changes in status
- Explore companies' general practices, rationale and challenges surrounding their use of change in status policies, application in multiple jurisdictions and the support of equity software
- Discover best practices for obtaining consensus and communicating these types of policies and their impact to affected employees

Denise Glagau, Baker McKenzie (US)
Simona Paduraru, Alphabet (US)
Dexter Tang, Google (UK)

Employee Engagement

Field of Study, Level: Personnel/HR, 0
Location: Level 1, Harris

6.3 Evolving Participant Expectations and How to Meet Them

As the future of work evolves and the war for talent remains prevalent, companies should discuss new possibilities that digital technologies offer for participant engagement to ensure share plans deliver on stakeholder expectations.

This informed interactive discussion-based session examines the types of equity compensation and supporting technology platforms that help attract and retain employees.

- Discover the types of equity compensation that help attract and retain talent in the current market
- Review the changing technology landscape, and how it has influenced user expectations and experience
- Hear the financial education, wealth creation and management and communications strategies that work for your employees

Marcus McEvoy, Computershare (UK)
Liz Pierson, Deloitte
Sandra Sussman, SAP
Marc Muntermann, Siemens Energy
Miguel Navarro, Telefonica

Employee Engagement

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Ochil

6.4 Equivalent but Not Equal: Inclusive Global Expansion

Many companies have considered expanding their long-term incentive schemes beyond domestic inclusion to ensure equal treatment of employees globally.

While there are some countries that are just a 'no go' for expansion, there are also some plan design features that are problematic and can create more of a headache than a benefit.

This session provides the tools you need to make sure your equity plan is ready to take over the globe.

- Explore globally compatible plan types and structures such as Trust Arrangements (UK), Qualified Plans (UK and US), Restricted Stock Awards, U.S. Disregarded Entities, and more
- Discover which plan designs work in the US, UK, Australia, France, and other EU countries
- Hear from experts located in the UK, Ireland and the US as they share their learnings and experience

Sarah Bruce, Tapestry Compliance Limited (UK)
Blake Eisenberg, Aon (US)
Jason Tolsky, CME Group (US)
Victor Torres, Perrigo Company plc. (UK)

Trending Now

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Platform 5

6.5 Ask Your Peers: Practical Tips from Across the Globe

The global equity compensation profession is complex, challenging, and ever-changing. Do you sometimes wonder if you are the only one struggling with something or wish you knew what your peers were doing? Led by GEO Fellows, this interactive, issuer-focused conversation will use peer discussion, live polls, and Q&A to provide a unique opportunity to find the answers you need. The panel of seasoned experts will facilitate discussion around employee engagement, cross-department collaboration and growing your career.

- Discuss examples of successful employee engagement and dynamic communications
- Learn from best practices and valuable insights on collaboration challenges in virtual and hybrid workplaces
- Growing your career in the field of equity compensation

Tommy Swindle, FGE, UBS Financial Services Inc. (US)
Cherie Curry, FGE, Hilton Worldwide (US)
Yael Elbaz-Riotter, FGE, AppsFlyer (IL)

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Private and Pre-IPO Companies

Field of Study, Level: Specialized Knowledge, III
 Location: Level 0, Kilsyth

6.6 Trends in Employee Equity Liquidity: Must Employees Wait for the 'Exit'?

The liquidity madness of 2020-2021 has passed and alternatives to capitalize on investment, including prospects of employee liquidity are reducing. Companies who are mature and were planning on an IPO or sale, must change their strategy or sell at a low price.

This brings significant challenges to companies attempting to show employees value in their equity awards. This session will focus on privately held companies in the Israeli market as a mirror to the global high-tech market.

- Find out if companies really have to wait for an IPO or sale to enable employees to liquidate part of their equity awards
- Discover how companies can attract employees when liquidity is unknown
- Hear best practice and learnings for private companies to engage their employees

Shachar Porat, Herzog Fox and Neeman Law Firm (IL)
 Ronen Shitrit, Adv., I.B.I Trusts Management (IL)
 Adi Zentner, Adv., Equitybee (IL)

Finance, Tax and Accounting

Field of Study, Level: Taxes, II
 Location: Level 0, Moorfoot

6.7 The Multiverse of Mobile Equity Risk

How do you navigate the exponential growth of cross-border employees?

Do you know what your company's risk exposure is if your participants are in a location other than where they were when grants were awarded?

Which risks cause the biggest concerns for your company's equity program?

Many companies have seen an increase in the movement of their workforce. Such an increase can create employer risks.

During this session, the expert panel will review real life case studies that will highlight factors to help you assess your organization's risk profile.

- Gain valuable insights from issuers of a publicly traded and a privately held company
- Get access to a tool that will provide a self-assessment score of your company's mobile equity risk profile
- Discover the key ways you can identify the most significant risks for your mobile population entitled to long-term incentives
- Plan for your next steps with your fellow stakeholders

Lynn Carbo, Global Tax Network (US)
 Nadine Franczyk, FGE, Amyris (US)
 Tara Hagen, Global Tax Network (US)
 Shokiah Williams, Brex (US)

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Data and Business Intelligence

Field of Study, Level: Specialized Knowledge, 0
 Location: Level 0, Tinto

7.1 Pre-Launch Preview: NEW! Global Share Plans Ranking Report

GEO's new Global Share Plans Ranking Project is the first of its kind. Designed to provide a snapshot in time, senior equity compensation industry issuers and service providers have provided rankings across a wide range of criteria for their country of expertise.

The resulting report provides the bigger picture: a detailed country-level view of the appetite, support and provision of employee share ownership.

This session provides report highlights and key takeaways, as well as providing an understanding of how the report can be used for ideas on how to improve regional plans, assess the risk of expanding into new countries, or to start a conversation with regional stakeholders to increase access to share ownership around the globe.

- Discover the countries leading the way, and those that have room to develop their employee equity offer
- Explore key report findings, including trends and barriers to adopting share plans
- Find out how you can use the report to decide which countries to extend plans into, or take learnings to improve the take-up of equity compensation in your region

Eileen Liu, Arnold Bloch Leibler (AU)
 Shaun Cartoon, FGE, Arnold Bloch Leibler (AU)
 Bill Castellano, Rutgers University (US)
 Don-Tobias Jol, Baker McKenzie (NL)

Operational Effectiveness

Field of Study, Level: Specialized Knowledge, 0
 Location: Level 1, Carrick

7.2 Sanitizing Your Share Plans: Grant Hygiene

Just below the surface, grant policies may be harbouring headaches and hiding poor practices. These policies often hold the secrets to using equity to truly meet business objectives while fostering equality and steering clear of unconscious bias.

The expert panel share best practice to help you avoid underperformance due to promotion grants, leaves of absence, and retirement eligibility. Join this session to explore the surprising results that different approaches to grant sizing can have, however well intentioned.

- Get a forensic audit on grant practices
- Avoid troublesome grant sizing and vesting arrangements
- Access recent survey data, carefully analyzed by experienced practitioners and advisors

Emily Cervino, FGE, Fidelity (US)
 Margie Molesso, Walmart (US)
 Dave Peterson, Hologic, inc. (US)
 Liz Pierson, Deloitte LLP (UK)
 Anabel Pichler, GlobalFoundries (US)

Legal and Regulatory

Field of Study, Level: Communications and Marketing, II

Location: Level 0, Moorfoot

7.3 Top Global Equity Compliance Mistakes and How to Fix Them

Operating global share plans is a tricky business, and despite best efforts, errors can and do occur. In this session, the expert panel identifies common mistakes that arise with global share plans and how to address them.

In each case, you will discover how to rectify past errors based on real-life case studies and receive practical tips and best practices for mistake-free global share plan offerings.

- Uncover common mistakes in tax-qualified plans, including US Section 423 ESPPs, French-qualified option and RSU plans, and UK tax-qualified share schemes
- Learn how to deal with plan interpretation or governance failures
- Discover how to correct tax withholding, reporting and other compliance issues

Agnès Charpenet, Baker McKenzie (FR)
Jeremy Edwards, Baker McKenzie (UK)
Sinead Kelly, Baker McKenzie (US)

Employee Engagement

Field of Study, Level: Specialized Knowledge, 0

Location: Level 1, Harris

7.4 World Class ESPPs at Every Stage

The world of ESPPs never sleeps for global organizations. And companies at different stages of their life cycle have other things to consider whilst working hard to ensure their ESPPs land with the right impact to employees everywhere.

This session explores the differences and the similarities in how two companies at different life stages (IPO, growth and mature) approach education for their participants, providing tools and unique strategies to drive high participation and learning from their success.

- Hear how communication methods can change depending on the life stage and which countries are impacted
- Explore which communication methods our panel found successful, the lessons they learned and what would they do differently
- Discover how to handle a variety of languages and multiple time zones when your stock plan admin sits halfway across the world

Jen Francis, Aon (US)
Anthony Pettinelli, Silicon Valley Bank (US)
Brett Andersen, Confluent (US)

Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
 Location: Level 1, Ochil

7.5 Rewarding Employees in Israel and the Impact of AI on Employee Plans

Israel is an entrepreneurial powerhouse and a hotbed for pioneering technologies, profitable business opportunities, and high investment returns. Many of the world's leading multinational companies have all chosen Israel - Microsoft, Motorola, Google, Apple, Meta, Berkshire-Hathaway, Intel, HP, Siemens, GE, IBM, Philips, Lucent and J&J are just some of the companies of over 200 MNCs who have opened offices or innovation centers in Israel. Understanding how business is done and how AI is impacting ownership tracking is key to building high growth businesses in Israel.

Participants will learn:

- Determine how to be competitive in Israeli and retain employees in a hot labor market
- Understand the special requirements under Section 102 and 3i to allow for special tax treatment for Israeli taxpayers
- Learn how AI is utilized to support employee share scheme requirements, board meetings and share registrars

Carine Schneider, FGE, AST Private Company Solutions (US)
 Omer Yaniv, Psagot Equity (IL)
 Kevin Collins, Charli.ai (CA)

Private and Pre-IPO Companies

Field of Study, Level: Specialized Knowledge, II
 Location: Level 0, Kilsyth

7.6 Transaction Readiness: Are You Ready?

Private companies have the unique opportunity to evolve their business throughout every stage of their life cycle. Whether you are an emerging company preparing to raise funds, or a late-stage company exploring your paths to liquidity, understanding the relationship with internal and third-party partners is key as is keeping your equity data 'Transaction Ready'.

This panel will discuss important considerations for transaction readiness through major events such as fund raising, global expansion, new equity vehicles, liquidity events, and more.

- Identify the key stakeholders internally and externally for each event type
- Understand the timing and critical milestones leading up to an event
- Discover how to factor the employees' experience into your plans

Lars-Kristian Bråten, cigaM AG (CH)
 Fleur Bennis, Wilson Sonsini Goodrich & Rosati (UK)
 Ceri Newby, Skyscanner (UK)
 June Davenport, Morgan Stanley at Work (ES)

Employee Engagement

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Platform 5

7.7 Full Colour Comms: Illustrating the Way to Employee Engagement

Would you like to create a stand-out campaign that gets your people talking and responding the way you need them to?

This session will examine the best ways to apply creative thinking to your employee engagement strategy. The panel includes members of the creative studio at Stitch, who will discuss vision behind campaigns to successfully promote all-employee share plans and incentives.

They'll examine how adding a creative twist to an existing brand can bring comms to life in an intriguing way, while still feeling familiar enough to resonate with their audience.

- Learn how to use winning design to transgress language barriers and create a universal language of its own
- Discover how to develop a creative concept that works effectively across all media
- Find out how Pearson and CCEP pushed brand guidelines but stayed within the rules

Amy Brimble, Stitch - a Deloitte business (UK)
Caroline Dillon, Stitch - a Deloitte business (UK)

Trending Now

Field of Study, Level: Personnel/HR, 0
Location: Level 0, Tinto

8.1 Keeping Equity Relevant in Uncertain Times

With a global recession on the horizon and the effects of the 'Big Squeeze' being felt across all industries, how do companies continue to keep employees engaged and maintain and encourage participation in their equity compensation schemes?

This panel will focus on how companies are navigating the current climate and what they're doing to keep equity at the forefront of their talent acquisition and retention strategies.

- Discover how to make equity part of your company culture
- Find out how to avoid the fall out of 'The Great Resignation' and 'Quiet Quitting'
- Hear how to keep employees engaged through innovative initiatives and targeted communications

June Davenport, Morgan Stanley at Work (ES)
Chrissie Davis, Eximia (UK)
Vikki Scott, Diageo (UK)
Phoebe Stamford-Moroz, Tate & Lyle (UK)
Dexter Tang, Google (UK)

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Finance, Tax and Accounting

Field of Study, Level: Taxes, II
Location: Level 0, Moorfoot

8.2 Payroll Doctor for Equity – We've Got the Cure!

The payroll team is a key equity program stakeholder and plays an important role in ensuring that the complex rules for equity are navigated, and delivery in cash or reporting for equity is accurate.

This session pays a visit to the 'Payroll Doctor' to address the key remedies for managing, updating, and withholding in various countries around the world.

Whether you are new to delivering equity or are venturing into new countries, this session promises some key takeaways that can avoid a casualty for your equity program.

- Hear how to work with payroll to achieve full equity program compliance
- Learn the tips and traps of expanding globally
- Learn valuable lessons from corporate issuers and service providers

Leann Balbona, FGE, KPMG, LLP (US)
Ian Dawe, KPMG LLP (UK)
Leonie Doyle, MongoDB (IE)
Victor Torres, Perrigo Company plc. (UK)

Employee Engagement

Field of Study, Level: Specialized Knowledge, 0
Location: Level 0, Kilsyth

8.3 Empower Your Employees! Choice Plans for a Tailored Equity Experience

Who doesn't love freedom of choice! As employee needs become more diverse and individualized than ever, flexibility in reward and benefits packages is increasingly important.

Introducing equity choice plans is a way to empower employees to tailor and maximize the impact of their equity awards.

This panel will discuss the effective use of these plans that offer employees the opportunity to choose the types of equity awards that make up their total compensation package.

- Discover which equity awards are commonly included in choice plans
- Hear from organizations who are leading the way
- Learn about the pros, cons, and considerations of choice awards

Pat Sims, PJS Consultancy (UK)
Sydney Hilzenrath, Iron Mountain (US)
Evans Longacre, Fidelity (US)

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Trending Now

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Carrick

8.4 Uber: A Non-traditional Approach for Global Non-traditional Workers

The nature of work has changed. In recent years, companies are increasingly open to engaging a disparate global workforce and the traditional employer-employee relationship is no longer the only way to engage those workers. While the contractual relationship might have shifted, the need to offer equity and incentive compensation hasn't, and we are seeing an increasing prevalence of companies offering equity awards to 'non-traditional' workers all over the world.

The session will share practical learnings from one of the world's most progressive companies: Uber, and review how businesses are looking at ways to offer share-based incentives to workers who do not fall into the traditional employee/employer relationship.

- Explore the global tax and legal considerations of employing gig economy, consultants, contractors, employers of record, non-executive directors, and remote workers
- Discover the technical challenges faced by companies wishing to offer equity to non-traditional workers
- Hear from Uber as they share how they have navigated ways to drive forward their plans

Mark Miller, Deloitte LLP (US)
Sarah Keith, Deloitte LLP (UK)
Peter Kontara, Uber (US)

Design and Strategy

Field of Study, Level: Specialized Knowledge, III
Location: Level 1, Harris

8.5 Offering Employee Equity in APAC

This session takes you on a journey around APAC, from Japan to Singapore, on to Hong Kong and China, and finally to Australia to discover the trends and top three issues for the region's employee equity.

- Uncover practical insights for how to manage equity offers to employees in these locations
- Hear from an expert panel, experienced in the unique regional issues and opportunities
- Access the tools you need to execute effective plans in the APAC region

Marc Bosotti, Vialto Partners (AU)

Design and Strategy

Field of Study, Level: Specialized Knowledge, II
Location: Level 1, Ochil

8.6 The Top Five Equity Issues to Conquer for Successful M&A Transactions

With the market down, mergers and acquisitions (M&A) are hot and compensation team need to be informed about equity awards in transactions.

This session will focus on getting the most important things right in an M&A transaction: administration, communications, tax, accounting and integration.

Our expert panel is well placed to help you understand the big picture and ensure the most pressing issues are addressed. You will hear from an issuer who has worked on multiple transactions, a technical advisor and an equity compensation platform specialist.

- Discover the technical and administrative issues to be considered in the treatment of M&A equity awards and how to address them
- Prepare for the successful integration of your equity plan, post close.
- Hear advice and lessons learned from experts in corporate transactions

Chris Dohrmann, Global Shares - a J.P. Morgan company (US)
John Rowland Jones, Ballys (UK)
Jennifer George, PwC (US)

Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location:

8.7 Out with the Old, In with the New: A Spotlight on All-Employee Plans

With the focus on employee ownership continuing to trend upwards, but the cost of living impacting us all, many companies are revisiting, or revisiting, their all-employee offering.

This panel will hear from two sides of the coin with Sage, who are looking at whether their established all-employee plan model remains fit for purpose, and Vertical Aerospace, a newly listed company looking to demonstrate a 'one size' plan really can suit all. With all-employee plans continually on the mind, and the agenda, for companies and stakeholders - is this the year for change?

With so many routes to an all-employee offering available, which plan will provide the best solution when you're looking to make a change, or looking to introduce something new? Is the grass always greener? Is providing for all, the right call?

Emilie Sylvester, Tapestry Compliance Limited (UK)
Chris Fallon, Tapestry Compliance Limited (UK)
Julie Shepherd, FGE, The Sage Group plc (UK)
Ian Sanders, Vertical Aerospace (UK)

Employee Engagement

Field of Study, Level: Business Law, 0
 Location: Level 1, Harris

9.1 From Recruitment through Retirement: Videos That Drive Employee Engagement

Every employee story has a beginning, a middle, and an end. From the moment they start thinking about joining the company to the moment they sail off into retirement in an ESPP-funded boat, they need help understanding how their equity compensation works. But what they need changes as their needs change.

Hear how three companies have used video communications to tell their stock plan stories to everyone from new recruits to mobile employees, to people headed off on leave.

- Discover how visual communication can help simplify complex topics for audiences across countries
- Find out how to tailor message content and delivery to specific needs
- Gain insight and inspiration from three company case studies

Pam Chernoff, Aon (US)
 Nicole Thomas, Shopify (US)
 Paula Glen, California Water Service Co. (US)
 Laura Fahnlander, The Trade Desk (US)

Legal and Regulatory

Field of Study, Level: Specialized Knowledge, III
 Location: Level 0, Moorfoot

9.2 The Art of the Deal: Adjust, Convert and Flourish

Corporate transactions can have knock-on effects for outstanding equity awards and plans.

This session explores best practice on the approach and communication of these changes to awards, including the administrative and timing challenges encountered when reflecting award adjustments on broker platforms.

The expert panel includes senior representatives from Atlassian and CSL who will share their experiences, including managing awards during the re-domiciliation from a UK to a US parent company, and the equity award challenges resulting from a \$11.7 billion acquisition.

- Discover the common pitfalls when adjusting awards post-transaction including which transactional adjustments can trigger tax and regulatory issues for issues that have granted in multiple countries
- Find out how to provide accurate, bespoke, meaningful and concise communication of the changes to participants
- Review how to prepare equity award databases to reflect adjusted awards, dealing with rounding and black-out periods

Barbara Klementz, Baker McKenzie (US)
 Micaela Costello, CSL (AU)
 Scott Harrison, Morgan Stanley at Work (US)
 Sinead Kelly, Baker McKenzie (US)

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Executive Pay

Field of Study, Level: Personnel/HR, 0
Location: Level 0, Kilsyth

9.3 Executive Equity Compensation in Different Corporate Environments

How does executive equity compensation differ in public and private companies?

Leveraging the experience of equity professionals who have worked in both the public and private sector, this session will examine the role of equity compensation across various industries and life-stages.

The panel includes a workplace equity consultancy who will share observations around how equity plays a role in creating pay "equity" in an organization.

- Find out how executive equity compensation differs in private and public companies
- Learn how to leverage data and analytics to achieve workplace pay equity
- Discover how to integrate data with market practice when developing equity strategy

Kat Carlo, Vialto Partners (US)
AmyLynn Flood, Vialto Partners (US)
Lori Serrano, FGE, OutSet Medical (US)
Ramon Dominguez, Lucid Motors (US)

Executive Pay

Field of Study, Level: Specialized Knowledge, II
Location: Level 0, Tinto

9.4 Spotlight on Trends in Global Executive Plans

As executive pay steps into an increasingly bright spotlight, companies are facing the challenge of setting meaningful performance targets in volatile markets, and what to do if it all goes wrong.

This session looks at the latest trends in discretionary plans and the measures companies are using to recruit and retain top talent.

The expert panel will analyze the pressures that companies are facing when setting and paying executive remuneration, ranging from the latest corporate governance measures, legislative reform and market practice.

- Hear how you can recruit and retain top talent in the current market
- Discover the challenges companies are currently facing when setting and paying executive remuneration including demands of the proxy advisers, pay for performance rules, how to implement malus and clawback effectively and how to deal with 'windfall gains'.
- Find out what's next for executive plans

Jon Burg, FGE, Infinite Equity (US)
Anna Fletcher, Rentokil Initial plc (UK)
Hannah Needle, FGE, Tapestry Compliance Limited (UK)

Legal and Regulatory

Field of Study, Level: Taxes, II
Location: Level 1, Ochil

9.5 W8 BEN Approach, Education, Guidance

Finding ways to successfully navigate the dreaded W8BEN can be as elusive as the Loch Ness Monster! This expert panel share ways to help your equity holders by explaining why it is needed and why it is important for your employees to maintain current information and update their form every three years.

- Discover what W8BEN is and why employees must complete it
- Hear Samsara and Bumble's innovative approaches to ensuring their international population has every opportunity to have happy and hassle-free transactions
- Understand the minimum education and resource requirements and how your equity partners can help your global participants

Brent Duman, Charles Schwab (US)
Megan Hunt, Samsara (US)
Georgina Lai, Alation (US)
Richard Flynn, Charles Schwab (UK)

Design and Strategy

Field of Study, Level: Specialized Knowledge, 0
Location: Level 1, Harris

10.1 It's a Big World: A Guide to Managing Global Corporate Events

Are you prepared for your corporate transaction? This session will explore the key concepts, drivers, and frameworks of major corporate events, including M&A, stock splits, and special dividends. The expert panel will guide your global company through best practices for managing data, reporting, participant expectations, and education.

- Discover how to plan for success and the pain points to know before you start
- Walk through the key stages and actions before, during and after the event, from project mapping to testing and reporting
- Hear best practice in educating global participants for success and managing their expectations

Nathan O'Connor, Equity Methods (US)
Greg Fox, SNAP (US)
Emily McIntyre, Bumble (US)
Ben Ramos, Charles Schwab (US)

Design and Strategy

Field of Study, Level: Business Law, 0
Location: Level 0, Tinto

10.2 What's the 'Perfect' Equity Plan? Perspectives From Across the Pond

Designing the 'right' equity plan design that works across different geographies can be challenging. What prospective employees expect, and what investors want, can be driven by local norms. How do global companies keep everyone happy whilst doing what's right for the company and its strategy?

This session will look at current and emerging trends in executive equity incentives in the UK and US to highlight where there's common ground, and where practice is diverging. The expert panel includes issuers who will give their front-line perspective on designing and selling plans to both UK and US employee audiences and discuss whether one-size-fits-all designs work, and the influence culture has on plan design.

- Discover how cultural perspectives on pay inform plan design in your country
- Find out how to reconcile pay-for-performance with caps on pay
- Learn whether the challenging economic environment and spiralling cost of living will lead to changes in plan design

Andrew Gaines, Linklaters LLP (US)
Bradley Richardson, Linklaters LLP (UK)
Mark Higgins, WPP (UK)

Legal and Regulatory

Field of Study, Level: Taxes, III
Location: Level 0, Moorfoot

10.3 Far Beyond SAFE – Post-Pandemic Equity Compensation in China

Post-Covid, the business landscape in China is growing quickly and driving opportunities for growth and expansion. To operate successful share plans that are competitive and relevant, it is critical to understand the cultural history, stakeholder impacts and evolving regulatory landscape of employee ownership in the region. This session details how China's employee ownership culture has altered since the pandemic and what businesses must do to operate plans compliantly and efficiently.

- Uncover the latest developments in government policy as it navigates continued globalization
- Discover how Chinese policy makers are focusing on employee ownership, equity compensation and technology enterprises
- Learn from Lucid Motors' experience of establishing stock plans in China as a cornerstone for expansion

Matt Connor, FGE, Lucid Motors (US)
Dr. Adie Leung, FGE, Citigroup (HK)
Sean Trotman, FGE, Deloitte LLP (US)

SESSIONS

IMPORTANT: The details in this document are subject to change. Please visit [GEO's website](#) for current session information. Last updated 10 March 2023.

Legal and Regulatory

Field of Study, Level: Specialized Knowledge, III
Location: Level 0, Kilsyth

10.4 Making the New Pay for Performance Rules as Easy as 1-2-3

In late Q3 2022, the SEC issued the final rules on Pay for Performance. As expected, there were some significant new reporting requirements for the CEO and the Named Executive Officers, particularly around employee equity compensation.

Join this dynamic panel whose expertise and experience will help you feel the changes are as easy as 1-2-3!

Liz Stoudt, Infinite Equity (US)
Cherie Curry, FGE, Hilton Worldwide (US)
Kelly Geerts, Morgan Stanley at Work (US)