

 INFINITE EQUITY

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# IMPACT

## PRODUCT GUIDE

# Introduction

Your benefits package has been created with dedication and effort. Now it is imperative to ensure that the communication strategy you have in place is effective so that employees are informed and engaged about their plans. A variety of formats can be used to inform your employees about their benefits, such as emails, FAQs, one-pagers, posters, videos, and more. Utilizing a variety of formats will ensure that all employees receive the educational information they need in the format that suits your company.

As experts in equity compensation and design, we are able to help drive employee engagement with our clear and engaging communication solutions. Get a better understanding of how Infinite Equity can help you implement these materials within your budget by reviewing this product guide.

## Making the Most of This Interactive Guide

To get started, use the arrows < > on the right-hand side to navigate between pages, or you can jump to a specific page by clicking the corresponding topic. We recommend viewing the style options first to determine the appropriate costs for your budget. Then, explore all the available materials we can create for you. To preview what an item will look like in a particular style, click the corresponding style button **Signature** when on the material page.

For ease, we have curated a set of recommended packages based on your communication needs. You can even add additional materials to the packages or create your own.

Welcome

# Step One: Choose a Style




Choosing a style option that is within your budget is the first step in providing you with communication materials that are appropriate for your needs and business. We offer three distinct styles: *Signature*, *Branded*, and *Corporate Mark*, each with unique features.

## Styles

### Signature \$

This styling consists of just the company’s colors and logos incorporated into simplified templates, providing a sophisticated and professional look with iconography and graphics. It can be a simple solution to engaging employees while keeping with brand recognition.

**Features:**





-  Your Company Logo
-  Your Company Colors
-  Simplified Graphics

Please Note: Signature style materials are “off-the-shelf” items, therefore, the changing of layouts or adding additional content may not be accommodated, and will be subjected to additional fees.

### Branded \$\$

This styling consists of the company’s colors, logos, fonts, and icons (if applicable) blended with engaging iconography and layouts. The materials will stay true to engaging employees with simplified examples while also keeping with brand recognition.





**Features:**

-  Your Company Logo
-  Your Company Colors
-  Your Company Fonts and Icons (If applicable)
-  Stylized Documents and Examples

### Corporate Mark \$\$\$

This styling consists of the company’s brand materials customized from head to toe. Our design team and writers will study your company brand guidelines to create materials that look and sound like they were produced in-house by you. The materials will stay true to engaging employees with iconography and simplified examples incorporated into your company’s guidelines.

**Features:**

-  Your Company Colors, Logos, and Fonts (If applicable)
-  Custom Layouts / Templates (Matches your corporate identity)
-  Custom Iconography (If applicable) (Matches your corporate identity)
-  Stylized Writing (If applicable) (Matches your corporate identity)

# Step Two: Material Selection

To ensure that we meet the communication needs of your organization, we offer a wide variety of materials for you to choose from. You can select any of the following items a-la-carte or select one of our recommended packages. For materials that utilize style selections, we will use our Infinite Equity brand as the example.

Please click on an item below to learn more.

**Direct Communications**

**Print Communications**

**Digital Communications**

# Material | Announcements (*Email / Print*)

A series of written announcements to send to your target audience. Messaging varies but could include an introduction to the plan to eligible employees, review key plan provisions, or reminders when deadlines are approaching.

## Parameters:

- Standard email / document format
- *Optional:* Can be designed and sent as an attachment/embedded in your email message  
(Additional fee - HTML Style)

## Delivery Methods:

- Word Document
- PDF
- Can be printed and mailed for an additional fee  
(Upon request; Minimum quantity of 200)

## Pricing:

# Material | Brochure

A three-fold brochure that contains key information about your award and highlights the key benefits of your plan. Topics could include basic information about the award, how it works, enrollment, vesting schedules, and more.

## Parameters:

- Available in Print or Interactive format
- 3- Fold Accordion Style Document
- Full Color
- *Optional:* Included QR Code linking to a site or intranet for more information

## Delivery Methods:

- Saved as PDF and emailed to participants
- Can be printed and mailed for an additional fee  
*(Upon request; Minimum quantity of 200)*
- Hosted on microsite or website

## Pricing:

# Material | Frequently Asked Questions (*FAQs*)

Our FAQ booklet is a great way to showcase all the commonly asked questions and answers about participants equity awards. We design it in a way to provide quick and easy access to the information they need, while supporting explanations with examples and iconography.

## Parameters:

- Multi-Page Booklet (*8.5x11 single-page or 11x17 facing pages document*)
- Full-color
- Available in Print or Interactive format
- U.S. Specific  
(*Add additional countries for a fee*)

## Delivery Methods:

- Saved as PDF and emailed to participants
- Can be printed and mailed for an additional fee  
(*Upon request; Minimum quantity of 200*)
- Hosted on microsite or website

## Pricing:



# Material | Microsite

A microsite is used to convey your equity plan and centrally house any plan materials such as documentation, links, and more, in order to reach broad-based employees. There are no login credentials required and is mobile- and tablet-friendly.

## Content:

## Parameters:

- Individual web page that exists outside your main website
- Individual vanity URL  
*(YOURCOMPANY.myequityaward.com)*
- Subscription-based site that can be updated as needed

## Delivery Methods:

- Direct link sent to participants  
*(can be accompanied with an email or text campaign)*

## Pricing:



# Material | One-Pager

The one-pager is a single-page, front and back document that contains key information about your award. Topics could include basic information about the award, how it works, enrollment, vesting schedules, hypothetical examples, key-terms, and more.

## Parameters:

- Standard 8.5x11 Document
- Double-sided; Full-color
- Available in Print or Interactive format

## Delivery Methods:

- Saved as PDF and emailed to participants
- Can be printed and mailed for an additional fee  
*(Upon request; Minimum quantity of 200)*
- Hosted on microsite or website

## Pricing:

# Material | Postcards

A personalized postcard featuring basic award information and important dates, created and mailed to your participants.

## Parameters:

- Standard 5x7 Postcard
- Double-sided; Full-color
- *Optional:* Included QR Code linking to a site or intranet for more information

## Delivery Methods:

- Printed and mailed to participants  
*(Minimum quantity of 200)*

## Pricing:

# Material | Posters

A personalized poster highlighting award information and important dates. Typically displayed in public spaces, such as an office setting or on a bulletin board.

## Parameters:

- 18x24 Poster
- One-Sided; Full-color
- *Optional:* Included QR Code linking to a site or intranet for more information

## Delivery Methods:

- Printed and mailed to office location  
*(Minimum quantity of 5 per location)*

## Pricing:

# Material | Statements

Personalized, data-driven, participant statements with relevant information pertaining to their individual equity awards, benefits, or other important information.

## Parameters:

- Standard 8.5x11 Document
- Double-sided; Full-color
- Available in Print or Interactive format
- *Optional:* Included QR Code linking to a site or intranet for more information

## Delivery Methods:

- Saved as PDF and emailed to participants
- Can be printed and mailed for an additional fee  
*(Upon request; Minimum quantity of 200)*
- View and download on participant account portfolio/platform

## Pricing:

# Material | Table Tents

A personalized, self-standing table tent featuring basic award information and important dates, created and mailed to an office location.

## Parameters:

- Standard 5x7 Table Tent
- Double-sided; Full-color
- *Optional:* Included QR Code linking to a site or intranet for more information

## Delivery Methods:

- Printed and mailed to office location  
*(Minimum quantity of 10 per location)*

## Pricing:

# Material | Training Deck

PowerPoint presentation created to review key features of the plan, including plan details, how to enroll, and a tax summary (U.S.) with infographics and illustrative examples for participants to gain a better understanding of the plan.

## Content:

## Parameters:

- Wide-Screen PowerPoint Presentation
- Multi-Slide Deck
- Full Color

## Delivery Methods:

- PowerPoint Document
- For use in a scheduled Webinar/Townhall or internal presentations

## Pricing:

# Material | Videos

Educational videos that teach participants about their equity awards; Interactive with glossary terms, links, and more. Videos are sold in sets (*typically 3-6 videos per set*).

## Content:

## Parameters:

- Pre-production: Script development and Voice Over Selection
- Production: Content Creation
- Post-Production: Interactivity, Final Output, and Subtitles
- Subscription-based videos
- *Optional:* Translation available upon request; Additional charges apply

## Delivery Methods:

- Embed Code / URL / IE Hosted

## Pricing:

*Due to the complexity and timing of fully customized videos, our videos are only offered at the Signature and Branded levels.*



# Engagements

## Office Hours

Our team will coordinate and schedule time for your participants to answer questions, address issues, and discuss topics regarding plan offerings/benefits.

**Parameters:**

- Specified time and dates for participants to reach out to our experts
- Offered virtually or in-person
- Can provide meeting link invites *(upon request)*

**Delivery Methods:**

- Direct link sent to participants  
*(can be accompanied with an email or text campaign)*

**Pricing:**

**\$400 - \$600 / hour** *(1 Expert)*

**\$800 - \$1,200 / hour** *(2 Experts)*

## Townhall / Webinar

Our team can educate participants directly or train a member of your team about the equity award being granted including plan details, examples, and taxation. Each session is scheduled for one (1) hour.

**Parameters:**

- PowerPoint presentation approved by Client that will be used to present at the Townhall / Webinar
- Offered virtually or in-person
- Can provide meeting link invites *(upon request)*

**Delivery Methods:**

- Direct link sent to participants  
*(can be accompanied with an email or text campaign)*

**Pricing:**

**\$2,500 per session**

**+ Cost of Travel** *(if applicable)*

### Meet Some of Our Experts



**Robyn Shutak**  
FGE, CEP  
*Partner*



**Liz Stoudt**  
ASA, CEP  
*Partner*



**Geoff Hammel**  
JD  
*Managing Director*







**Nicole Contreras**  
*Director*

## Engagements

# Step Three: Package Solutions






We offer packaged communication strategies that complement each other by providing added value for your participants and to provide a more comprehensive solution to your communication needs.

## Equity-Focused

-  1 Training Deck - General Education  
*(U.S. country tax example included)*
-  1 Virtual Webinar
-  1 One-Pager
-  Email Campaign - 3 Emails  
*(Awareness, Launch, and Reminder)*



Pricing:

## Tax Specific

-  1 Training Deck - Tax Specific  
*(U.S. country tax example included)*
-  1 Virtual Webinar
-  1 FAQ - Tax Specific
-  Office Hour - 1 Hour
-  Email Campaign - 3 Emails  
*(Awareness, Launch, and Reminder)*

Pricing:

## Digital Experience

-  Microsite  
*(Includes up to 3 countries)*
-  Videos

Pricing:

## Packages