



Equity Administration

Private Companies

Do you want to ensure your company has a comprehensive equity management solution that navigates growth to an initial public offering (IPO) and beyond?

Businesses with a growth-oriented mindset and aspirations for expansion will encounter diverse requirements at each stage of their development. Whether you find yourself in the initial stages of securing early-stage funding or reaching the culmination of preparations for an IPO, we offer tailored solutions for administering cap table and equity to support your unique journey.

“Your stock plan administration partner should ensure that every facet of your equity administration is handled with the utmost care, mitigating risks, and keeping your plan compliant at all times. By outsourcing to our team, you gain the freedom to focus on core business initiatives without the burden of managing the day-to-day tasks.”

Michelle Tomasetti | *Infinite Equity*

Comprehensive Support for All Equity Platforms

Astellla

Carta

Certent

OptionTrax

Pulley

Shareworks by Morgan Stanley

Empower Your Team, Your Organization, and Your Employees

Outsourcing Administration

Outsourcing equity plan administration isn't a one-size-fits-all solution. Each company's size, plan complexity, and budget are all factors. Outsourcing provides a scalable solution for rapid growth, complex plans, limited resources, and a potential public offering.

Consulting and Advisory Services

Our team can provide strategic insights, advise on best practices, and assist with specific compliance requirements. Additionally, we offer a comprehensive health check of your current equity plan, ensuring that all aspects of your program are optimized for success.

Revolutionize Your Equity Plan with an Efficient Outsourced Solution

Infinite Equity delivers extensive solutions for managing equity in private companies. Our expert team unlocks seamless stock plan excellence and elevates your administration with:



Specialized Expertise

Our team has specialized knowledge of complex equity regulations, tax implications, and best practices for administrating complex or unique stock plans. We streamline your processes, minimize errors, and ensure compliance—allowing your team to focus on core business activities.



Administrative Efficiency

Enjoy peace of mind with accurate cap table maintenance and equity grant administration. We will handle the support and maintenance of your stock plan platform, utilizing it for grant agreement acceptance, standardizing vesting schedules, processing vesting events, exercises, financial reporting and more.



Optimization and Control

Gain controls around data security and adhere to strict regulatory standards. We'll regularly analyze and improve internal processes for grant issuance, vesting calculations, and settlement that often eliminate bottlenecks.



Enhanced Participant Experience

Empower your employees with custom communication plans that meet them at the right time in their award lifecycle, ensuring they receive information when they need it most, fostering a deeper connection with their equity journey with increased participation and engagement.

 INFINITE EQUITY

 /infinite-equity-inc | info@infiniteequity.com | 1.215.908.4036



Let Infinite Equity Fuel Performance with Tailored Equity Solutions

Founded in 2019, Infinite Equity is a leader in its field, providing professional advice and technology-enabled solutions that allow businesses to create and support a prosperous ownership culture. Infinite Equity is known for its success in assisting companies to increase the effectiveness and return of their equity programs, believing that equity compensation drives performance and fuels success. To learn more about Infinite Equity's employee ownership solutions visit <https://www.infiniteequity.com> or scan the QR Code.