

Infinite Equity

Morgan Stanley at Work Channel Partner

If you secured expert help to administer your awards program, how much more business value could you create?

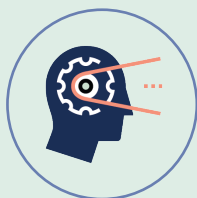


Your stock plan administration partner should ensure that every facet of your equity administration is handled with the utmost care, mitigating risks, and keeping your plan compliant at all times. By outsourcing to our team, you gain the freedom to focus on core business initiatives without the burden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

Michelle Tomasetti | *Infinite Equity*



Maintain Success with an Expert Team



Get More Bandwidth

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.



Reduce Costs

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 and evaluating grant value vs perceived value and more.



Deliver Seamless Compliance

Gain controls around data security and adhere to strict regulatory standards. We'll improve internal processes for grant issuance, vesting calculations, and settlement that often eliminate bottlenecks. We'll also create a process for performance goal tracking including controls around calculations, determine how awards are entered into your system, and manage third-party systems.



Improve Participant Engagement

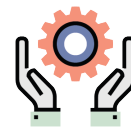
Empower your employees with custom communication plans that meet employees at the right time in their award lifecycle. Our approach ensures that your employees receive information when they need it most allowing for increased participation and engagement.

Comprehensive Support for Morgan Stanley at Work Clients



Consulting and Advisory Services

Our team delivers strategic insights, provides advice on best practices, and assists 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.



Plan Design & Technical Accounting

Every plan is designed on a one-to-one basis, so you can be assured that it meets your specific company goals. We'll work with you from the inception of your equity philosophy through the life of your grant, leveraging our technical accounting knowledge to avoid unintended outcomes.



Global Administration & Complex Plans

Our outsourcing model isn't a one-size-fits-all approach — it provides a scalable solution for rapid growth and global or complex plans. Each company's size, plan complexity, and budget are all factors that determine the way we manage your account.



Custom Communication Plans

We develop tailored communication plans that meet employees at the right time in the award lifecycle, ensuring your employees at the receive information when they need it most, fostering a deeper connection with their equity journey.

Infinite Equity's Team Can Tackle:

- Grants
- Dividends
- Exercises/Early Exercise
- Stock Ownership
- Mergers
- Insider Trading
- Section 16 Forms 3, 4, 5
- Complex Transactions
- Stock splits
- Repricing
- Repurchase
- IPO (ELR)
- Cap Table Management
- Secondary/Tender Offers
- Recapitalization
- Technical Accounting
- Pay Vs Performance
- Releases
- Rule 144

 /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.