



# Equity Administration

*Public Companies*

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

**Gain a strategic advantage with Infinite Equity's tailored Administration services. Designed for companies of all sizes, our outsourcing solution is a flexible hourly model, customized to each client's unique needs. Our approach delivers seamless compliance, drives employee engagement, and will help you reduce costs and free up your internal resources.**

“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

- Bank of America / Merrill Lynch
- Carta
- Certent
- Charles Schwab
- E\*TRADE by Morgan Stanley at Work
- Fidelity
- OptionTrax
- Shareworks by Morgan Stanley

## Empower Your Team, Your Organization, and Your Employees

### Outsourcing Administration

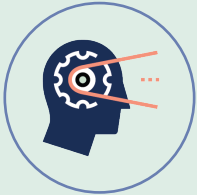
Our outsourcing model isn't a one-size-fits-all approach — it provides a scalable solution for rapid growth and complex plans. Each company's size, plan complexity, and budget are all factors that determine the way we manage your account.

### Consulting and Advisory Services

Our team delivers 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 Stock Plan Administration with an Efficient Outsourced Solution

Our Certified Equity Professionals unlock seamless stock plan excellence and elevate your administration with:



## Specialized Expertise

Our team has specialized knowledge of complex equity regulations, tax implications, and best practices for administering 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 knowing that all of your stock plan administrative tasks will be taken care of. 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.



## 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. 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.



## Enhanced Participant Experience

Empower your employees with custom communications 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, fostering a deeper connection with their equity journey which increases participation and engagement.

 INFINITE EQUITY

 /infinite-equity-inc | [info@infiniteequity.com](mailto: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.