

Vendor Selection & Assessment

Independent Equity Platform Search & Implementation

Selecting the right equity administration platform can save years of fees, friction, and operational risk. Selecting the wrong one can cost you all three.

Choose Your Equity Platform with Clarity and Confidence

Selecting an equity administration platform is one of the most important decisions you'll make for your equity program. The right partner can strengthen the participant experience, support your team's day-to-day operations, and position your program for long-term success.

Infinite Equity leads an independent, structured selection process that combines deep platform expertise with disciplined evaluation. The result: a partner you can trust, terms that work in your favor, and confidence that you've made the right decision the first time.

Our Engagement Includes

- Requirements Definition & Stakeholder Alignment
- RFI/RFP Development and Management
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- Weighted Scoring & Vendor Evaluation
- Best-and-Final Pricing and Contract Negotiation Strategy
- Implementation & Conversion Support

A Process Designed to Support Better Decisions

Independent and Vendor-Neutral

We don't sell software or accept referral fees. Our recommendations are guided solely by what's best for your organization, giving you objective advice and negotiating leverage throughout the process.

Deep Platform Expertise

We've worked alongside the industry's leading providers – including Fidelity, Schwab, Morgan Stanley, Empower, Computershare, EQ, and Certent, UBS, Bank of America, and JPM – and understand the nuances that don't always surface during a sales presentation. From pricing structures and service models to implementation considerations and contractual pitfalls, we help you evaluate what matters most.

Structured, Yet Flexible

Every organization operates on a different timeline. Whether you're conducting a standard vendor search or navigating an accelerated IPO-driven transition, our framework adapts to your needs without sacrificing rigor.

What Our Vendor Search Delivers

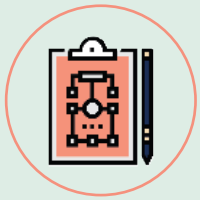


Discovery & RFP Design

Stakeholder Alignment: Conduct stakeholder interviews across stock administration, payroll, HRIS, finance, legal, and tax to distinguish critical requirements from preferences.

Evaluation Framework: Develop a streamlined RFI/RFP process that enables meaningful, apples-to-apples comparisons across vendors.

Decision Guardrails: Establish gating criteria upfront to identify potential deal-breakers early, reducing wasted time and effort.



Evaluation & Scoring

Consensus-Driven Scoring: Build customized weighted scorecards validated by key stakeholders.

Purpose-Built Demonstrations: Coordinate vendor demonstrations tailored to your organization's priorities and use cases.

Market Validation: Conduct reference checks with similarly situated organizations to validate vendor claims and implementation experiences.



Pricing & Negotiation

Cost Transparency: Compare total cost of ownership across vendors, including implementation credits, fee structures, escalators, and participant-based pricing.

Negotiation Strategy: Lead best-and-final pricing discussions to secure meaningful concessions.

Contract Intelligence: Evaluate contract provisions related to fee increases, termination rights, IPO timing considerations, implementation support, and other critical terms.



Implementation & Transition

Conversion Readiness: Coordinate data migration and historical record preservation through a co-managed approach designed to reduce internal burden.

Cross-Functional Coordination: Serve as a central point of coordination across internal stakeholders and vendor teams.

Relationship Stewardship: Manage communications with both selected and non-selected vendors professionally and thoughtfully, preserving valuable market relationships.

INFINITE EQUITY

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Ready To Set Your Equity Program Up for Long-Term Success?

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.