



Need More Engagement from Your Equity Plan?

How EQ's expertise in equity compensation
can help bring your employee plan program to life



Looking for more return on investment (ROI) from your equity plan solution? Want to enhance program efficiency while also improving participation? If so, you may want to consider your options for employee equity plan providers.

With EQ as your employee equity plan provider, our experienced team can work with you to build your employee equity plan solution. We collaborate with your teams to administer an equity plan that aligns with your specific objectives and supports your brand, business and culture. Our solutions are flexible, as they allow for as much or as little customization as you need.



The EquiTrax™ advantage

We bring your employee plan program to life through the EquiTrax™ platform, a flexible employee equity plan solution that provides actionable insights, advanced reporting tools and the support of an expert team to give you the information you need to make impactful business decisions..

[Explore ways EquiTrax can help elevate your employee experience.](#)

More rewarding experiences

With an average of 20 years of industry experience, your dedicated EQ team will work collaboratively with you to understand your business and help you navigate regulatory complexities. We know how important your employees are to you—and will help you build a solution to meet your employee equity compensation needs.



The EQ Difference

- EquiTrax is a broker-agnostic platform, where long-held shares can be sold through brokers of your choice.
- We don't solicit your executive team or employees.

At EQ, we understand the importance of your employees and their value to your organization. EquiTrax's intuitive dashboard was built to enhance the user experience and streamline the execution of transactions. Participants have real-time, 24/7 access to a consolidated view of all of their plan shares, as well as online educational tools. EquiTrax also has multilingual and multi-currency functionality, and is supported by a full-service call center.

Specialized services for your executives

At EQ, we recognize that your senior executive team and officers are paramount to the success of your business, and their time is one of your most valuable resources. Our specialized team for executives provides high-touch services, which ensures optimal handling of awards and navigation of regulatory and reporting challenges.

Improve operational efficiencies

When you work with EQ, we become an extension of your team, providing industry expertise and the analytics and insights you need to manage comprehensive employee compensation programs.

From the start, our team will work to ensure you'll have a seamless and efficient onboarding process. With EquiTrax, both administrative teams and employee shareholders have direct access to the information they need. To make work easier for the human resources (HR) and finance teams administering your plan, EquiTrax includes task-tracking tools, as well as access to full-service administrative support.

Streamlining services

EQ provides transfer agent services so your company can benefit from having one provider for both transfer agent and equity plan solutions services. This approach lowers risk and increases efficiency by only needing to use one portal and vendor instead of two. There are also fewer handoffs and more continuity of process. For example, one of the core responsibilities of a transfer agent is to maintain and manage records for their clients. When EQ provides both services, the equity plan solutions team works seamlessly with the transfer agent team to request share movements and process equity award transactions.





EQ supports efficient onboarding during a critical situation

When you choose EQ as your provider, you'll have access to all our services and teams when you need them.



CHALLENGE

An EQ transfer agent client of 16 years reached out to their relationship manager with a critical situation. Their current equity plan administrator/broker wanted them to move their equity plans business to another platform, as the broker was going to stop trading for them. The broker intended to remove the client from their platform within a four-week timeframe, and the client feared this migration would impact their employees' ability to sell shares during a sensitive period.



SOLUTION

EQ's transfer agent and equity plan solution teams were able to quickly collaborate to create a dedicated onboarding team. Alongside the equity plan solution relationship manager, members from the operations, onboarding, executive services and client service teams worked together to provide a short-term solution. to ensure their participants were able to sell their shares in a timely manner and continue to receive their proceeds, whilst the team also determined a long-term solution that allowed for a full data implementation onto our platform.



RESULT

The short-term, customized onboarding process was handled in record time and allowed the client to keep its equity plan program running smoothly, providing a seamless experience for participants.

Read the [full case study](#).

Get more insights from your data

The EquiTrax platform and EQ's team of experts deliver careful and meticulous financial reporting, strategic guidance and innovative, data-driven compensation solutions.

EquiTrax maximizes data impact by providing insights needed to make high-value decisions, such as enrollment statistics, shareholdings, award value and relevant demographics. Drill-down capabilities include:

- Excise tax
- Managed share balance
- Grant recap
- Grant detail
- Transactions
- Disposition detail

EquiTrax's reporting features allow participants to effortlessly view, model or transact their holdings; easily access a detailed history of activity and time-sensitive communications; and review equity plan related tasks.



EQ's ownership expertise

No matter your company's size or stage, EQ is uniquely positioned to support employee ownership growth. We understand the importance of investing in employees and our team of equity plan solution experts helps to administer plans best suited to your specific needs, delivered with seamless service and execution.

Are you ready to take the next step? We are. Reach out to get started.

ABOUT EQ

EQ are specialists in helping you better understand and manage the ownership of your company through critical events across the corporate lifecycle. As trusted advisors, we provide strategic insight and operations expertise through our core business units in Private Company Services, Transfer Agent Services, Employee Plan Solutions and Proxy Services. Globally we serve 6,700 clients (49% of the FTSE 100 UK and 35% of the S&P 500), with over 40 million shareholders, through 6,500 employees in 5 markets around the world.

REACH OUT

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