

Agenda

ESPP Day | November 7, 2019

8:00 - 9:00 a.m.

Breakfast & Registration

9:00 - 9:10 a.m.

Welcome

9:10 - 9:55 a.m.

Opening Address: The Evidence In Favor Of ESPPs and What The Future Holds

An employee stock purchase plan can be an effective benefit to offer your employees, and we've got the research and the evidence. Distinguished Professor Dr. Joseph Blasi will walk us all through the latest research in employee share ownership with the possible results for both your company and your employees in offering an ESPP. He'll also discuss how future Federal policy could possibly strengthen, encourage, and enhance ESPPs incentives.

Speaker: Dr. Joseph Blasi, Distinguished Professor and Director, Institute for the Study of Employee Ownership and Profit Sharing, Rutgers University

9:55 - 10:05 a.m.

Break

10:05 - 10:50 a.m.

ESPP Fundamentals

Start the day with an introduction to employee stock purchase plans (ESPPs). Learn the differences between a Section 423 tax qualified plan and a non-qualified plan, review plan terms and definitions, tax considerations and discover the many features to consider when designing your own program. This session will also highlight the benefits to offering an ESPP to both the company and the employee.

Speakers: Jessica Laddon, CEP, Senior Relationship Manager, Computershare; Brian Zamzow, Sr. Vice President, Head of HR Americas, Informa Markets

10:50 - 11:00 a.m.

Break

11:00 - 11:45 a.m.

Designing an ESPP

This session will take a deep dive into ESPP design. Learn how a well-designed plan combined with best practices can avoid potential pitfalls and ease administration. Panelists will review the benefits of an ESPP for the employee and the company, the corporate and employee tax considerations when choosing between a Section 423 qualified and non-qualified plan as well as company cost and expense considerations. You'll also learn how flexible ESPP plan design can be depending on your Company's goals and employee base.

Speakers: Scott Bellinger, CEP, VP Relationship Management, Computershare; Elizabeth Stoudt, CEP, Partner, Infinite Equity; Sandra Sussman, CEP, Global Equity Expert, SAP

11:45 - 11:55 a.m.

Break

11:55 a.m. - 12:40 p.m.

The Road to ESPP Launch

Ready to implement your company's ESPP? This get started session will provide attendees practical steps and tips on how to launch your newly designed ESPP. We'll discuss topics such as; preparing board presentations and proxy material for shareholder approval, best practices on choosing a trusted vendor, project planning and timing requirements from shareholder approval to plan launch, essential internal and external resources needed and much more!

*Speakers: Carmen Anderson, CEP, Senior Relationship Manager, Computershare;
Tracy Outar, Employee Stock Plan Administrator, Global Infrastructure Solutions*

12:40 - 1:30 p.m.

Lunch

1:30 - 2:15 p.m.

How to Make It All Work? Ongoing Administration of an ESPP

Once your ESPP has launched, there will be important ongoing administration duties required by you and your trusted vendor. This session will provide tips on the necessary ongoing administrative processes and best practices to keep your ESPP running like clockwork, including setting up automatic enrollment services, payroll processes, obligations and responsibilities for tax qualified and non-qualified plans, managing initial and ongoing employee enrollment contributions. Also learn what your internal and external partners need in connection with the day to day administration.

*Speakers: Kenneth Puritz, CEP, Senior Relationship Manager, Computershare;
Denise Ledbetter, Senior Global Equity Plans Manager, Mindbody*

2:15 - 2:25 p.m.

Break

2:25 - 3:10 p.m.

Considerations When Offering a Global ESPP

Offering an ESPP can be a great benefit that allows everyone around the world to participate equally, but launching such a truly global plan has its own challenges. In this unique session, join Sandy and Charlotte as they consider the challenges of both plan design/administration and communications in tandem and offer guidance on the recommended approach for engaging your audience and maximizing your offering.

*Speakers: Sandy Shurin, Senior Manager, Global Rewards, Deloitte Tax LLP;
Charlotte Cooper, Account Director, Stitch - a Deloitte business*

3:10 - 3:20 p.m.

Break

3:20 - 4:00 p.m.

ESPP Roundtable Discussion

To round out the day, we've gathered a panel of industry experts and issuers for an open discussion on everything ESPPs—from potential pitfalls and challenges and best practices to the future of the ESPP. This is also your chance to get answers to any questions you have that may not have been covered by throughout the day.

Speaker: Robyn Shutak, CEP, Equity Advisory Services Practice Leader, Computershare

4:00 - 5:00 p.m.

Cocktail Reception