



Equity Compensation Planner

Retain and engage your workforce through your equity compensation program

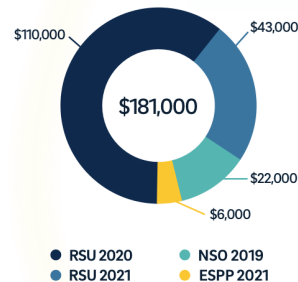
What is it?

A global capability that provides employees with the digital tools and professional financial guidance needed so they can view and manage their employer-provided equity compensation including Restricted Stock Options (RSUs), Employee Stock Purchase Plans (ESPP), and stock options.

- 1 Comprehensive and personalized employee experience**
24/7 access to view and track their equity compensation benefit.
- 2 Timely calls to action with push notifications**
Employees can keep a pulse on RSU vesting events, ESPP purchase events, stock option status, and when company-specific trading windows are open.
- 3 Dynamic and tailored education**
CFP-curated content including articles and webinars to elevate employee understanding of their equity compensation.
- 4 Personalized financial guidance and advice**
Unlimited access to Financial Planners who can evaluate concentration risks and help employees understand vesting, U.S. tax liabilities, and how to invest according to their wealth goals.



ARTICLE Understanding Your Equity Compensation



58% Vested

Trading
Open but closing in 19 days

Next Vesting
76 shares vest in 5 days

What employers can expect:

- ✓ Personalized experience for employees
- ✓ Equitable resources and support for your global workforce
- ✓ Higher employee retention
- ✓ Increased benefits utilization and engagement
- ✓ Risk mitigation through partnership with BrightPlan

Reach out to your BrightPlan representative