Employee Equity Services

8. GLOBAL EMPLOYEE EQUITY

Take advantage of tax concessions in various locations where the Plan operates

Conduct global due diligence to determine employee and employer tax and regulatory obligations

1. DESIGN AN EQUITY PLAN

Design a 'fit for purpose' employee equity plan that meets the Company's incentive objectives and maximises tax effectiveness for both employee and Company.

7. REPORTING

Determine the reportable amount for Employee Share Scheme ("ESS") Reporting purposes, including preparing ESS statements to employee and lodgement of ATO ESS annual report

2. PREPARE DOCUMENTATION

Prepare legal documentation (plan rules, invitation letters, application forms, etc.) to implement Plan.

Ensure securities law requirements are met including disclosure requirements, Board and shareholder approvals.

6. IMPLEMENT

Implement Employee Share Trust ("EST") to facilitate the Plan including all tax, legal and accounting services

Conduct a post implementation review to confirm the plan has been implemented correctly.

3. COMMUNICATIONS

Prepare an Employee Communications plan including answers to FAQs, Taxation Summary for employees, Employee briefing and Q&A sessions.

5. ACCOUNTING & VALUATION

Provide advice regarding accounting treatment of Plan grants including anticipated profit and loss charge.

Provide valuation services to value Plan grants for purposes of AASB 2 share based payments expense.

4. TAX ADVICE

Prepare tax advice (income tax & employment taxes) for both Company and employee.

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