

# SPECIALIST EMPLOYEE INCENTIVE SERVICES

## ESTERA ONLINE PORTAL

### KEY CONTACTS



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### ESTERA ONLINE PORTAL

The Estera online portal is central to our bespoke data management and consolidated online reporting capabilities and a core element of our enhanced employee incentive service offering. The portal enables us to share information with our clients and their advisors through a secure, cloud-based web solution, enabling users to access records relating to their share plan arrangements and employee holdings on demand.

Portal features include:

- Secure platform for all trust and plan documentation to be published and stored centrally
- Single controlled source of information for all related parties
- Access is restricted by user permissions and can be extended to include client advisors
- Security features can be upgraded to include, for example, two-factor authentication and IP address restrictions
- 24/7, on demand user access
- Secure messaging service

We maintain all plan records centrally via our share plan system, which has the capability of publishing and automatically updating customised reports to the portal. The suite of customised reports covers the following information:

- Total holdings within the trust, plan or nominee arrangement
- Summaries of share, cash or loan movements
- Participant holdings and transaction details to include award and shareholding balances
- Participant personal information

All reports are downloadable and exportable via the portal. Additional bespoke reporting can also be delivered on request.

For more information on our employee incentive services or to arrange a demonstration of the Estera online portal, please contact Patrick Jones or Brendan Dowling.



Technical **knowledge** and experience

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In-house legal **expertise**

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Strong **relationships** with clients and advisors

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Experienced team of 19 professionals dedicated to the provision of employee incentive services

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Impressive **turnaround** times on establishment

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**Value-added** service

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Understanding of **complex** arrangements combined with a legally-led approach

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Bespoke data management and consolidated online reporting **solutions**

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Online **register** of share / award holders available to clients and advisors

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Continued investment in **IT** systems and infrastructure

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## ABOUT ESTERA

Independent and global, our team of dedicated and highly qualified professionals creates smart and considered fiduciary solutions.

Established for more than 25 years, our strong legal heritage, rooted in our previous partnership with Appleby, and resolute commitment to the delivery of service excellence is what sets us apart.

We have a unique understanding of the complexities surrounding the world of fiduciary services which, combined with the standing of our rich history, inspires us to achieve the best possible results for our clients.

Our commercial acumen, attention to detail and responsiveness enable us to meet our clients' needs on time, every time.