

SPECIALIST
EMPLOYEE
INCENTIVE
SERVICES | JERSEY



FACT SHEET | SPECIALIST EMPLOYEE INCENTIVE SERVICES | JERSEY

WE HAVE EXTENSIVE EXPERIENCE IN THE ESTABLISHMENT AND ADMINISTRATION OF A WIDE VARIETY OF INCENTIVE ARRANGEMENTS, EACH ALIGNED TO THE INDIVIDUAL NEEDS OF OUR CLIENTS.

How we can help

Our specialist team has a wealth of experience in dealing with the entire range of employee incentive services and arrangements.

Whether it is the introduction of a new plan or the transfer of existing schemes, we strive to maximise the value and effectiveness of clients' incentive arrangements.

Our approach is collaborative; we work with our clients to establish their exact needs and align our services and teams around them.

We are technically led but pragmatic and commercial, which is essential to safeguard the integrity of the structures we administer while delivering an effective solution to meet our clients' requirements.

Our clients range from FTSE 100, 250, 350 and AIM-listed companies, multinational corporations and leading financial institutions to smaller, often private equity-backed, organisations. We also work closely with leading legal, accounting and advisory firms.

Our services

We are able to offer the full gamut of services and manage a variety of trust and non-trust based structures, including:

- Trustee and administration services
- Specialist employee incentive services for the private equity sector
- Corporate and employee nominee services
- Nominee arrangements for management
- Incentive arrangements for all employees
- Warehousing / internal market arrangements
- Warehousing reserved and unallocated shares
- Shares for rights arrangements
- Joint / co-ownership arrangements
- Post-IPO lock-in and incentive arrangements
- Assistance with leaver / new joiner arrangements
- Assistance with exits and trade sales
- Trustee review of investment agreements
- In-house legal review
- Restructuring support (through the use of employee share trust structures)



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SPECIALIST EMPLOYEE INCENTIVE SERVICES | JERSEY continued

- Bespoke data management and consolidated online reporting
- Long and short-term incentive plans
- Management incentive plans
- Employee share plans
- Deferred compensation plans (including deferral into funds)
- Performance, deferred and matching share plans
- Employee stock purchase plans
- Phantom plans
- Share option plans
- All employee share offers
- Employee shareholder schemes
- Employee share trusts
- Member benefit trusts
- 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.

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

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[estera.com](https://www.esteracom.com)

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Shanghai



Technical **knowledge** and experience



In-house legal **expertise**



Strong **relationships** with clients and advisors



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



Impressive **turnaround** times on establishment



Value-added service



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



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



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



Continued investment in **IT** systems and infrastructure

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.

For further information, please
contact one of our team members.

KEY CONTACTS



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