

ADMINISTRATION OF DEFERRED COMPENSATION PLANS

Our expertise comes from our banking heritage in one of the world's leading financial centres

www.equatex.com/financialservices



SECURITY, GOVERNANCE, AND COMPLIANCE

At Equatex, we are experts in supporting global banking and financial services organisations. Our heritage is in the banking industry and we operate in one of the world's strictest and most rigorous environments.

We provide highly secure and compliant share plan administration and reporting services for the world's leading companies.

Over recent years, increasing regulatory requirements compel financial services companies, to follow set guidelines on compensation plans for senior personnel.

At Equatex, we are experts in this arena and we provide a range of specialised services to the financial services market.



Streamline your global compensation plan management



COMPENSATION PLANS

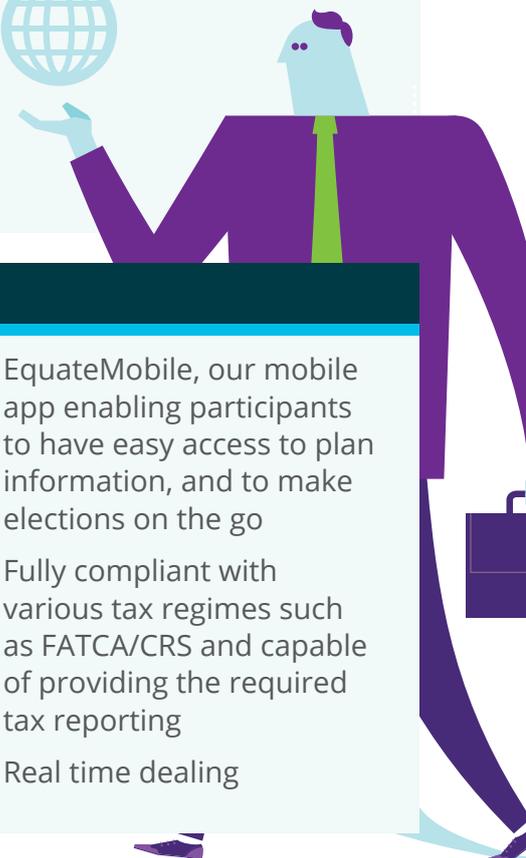
We support a wide range of deferred compensation plans including equity, cash and fund based plans. Our world class administration platform, EquatePlus, has been developed with governance and adherence to regulators requirements in mind. We support more than 100 blue-chip clients and nearly two million of their employees.

With a presence in nine centres around the world we are able to provide our clients a global service including trading in different instruments, multiple exchanges and in various currencies. We have a broad custodian network that meets our clients' complex requirements.

ACCOUNTING AND FINANCIAL REPORTING

EquatePyramid is the market leading solution for the financial reporting of deferred compensation.

As well as being integrated into EquatePlus, our own plan administration platform, EquatePyramid can easily link to other third party and HR systems. Our service is compliant with IFRS and US GAAP and provides a wide range of reporting and disclosure reports.



FINANCIAL SERVICE EXPERTISE

We work with some of the largest financial service organisations in the world and have expertise in:

- Helping companies calculate individual employee awards via EquateFalcon our powerful and flexible allocations tool
- Malus and Clawback
- Supporting awards which are linked to a wide range of performance conditions
- Awards made in funds
- Flexible management information reporting enabling disclosure reports to be produced quickly and securely
- Global, 24/7 and multilingual Contact Centre support
- EquateMobile, our mobile app enabling participants to have easy access to plan information, and to make elections on the go
- Fully compliant with various tax regimes such as FATCA/CRS and capable of providing the required tax reporting
- Real time dealing



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