

PRESENTATIONS & SPEAKER BIOS

General Session – Equity Plan Success (and Failure): What Have We Learned From the 2011 Proxy Season? (Levels I, II, III)

This session will focus on what we learned about equity plan governance from proposals that failed, as well as, those that passed despite receiving a negative recommendation from Institutional Shareholder Services (ISS). We will explore whether receiving the support of ISS is critical to the success or failure of your proposals. We will analyze the preliminary 2011 proxy season results and offer perspectives from the eyes of the company, its shareholders, and their advisors. Finally, we will offer planning tips and strategies for companies seeking shareholder approval in the coming year.

Jon Burg is vice president and West Coast Practice Leader of Radford Valuation Services, the equity valuation group of Radford, an Aon Hewitt Company. He has twelve years of benefits and compensation consulting experience, including all forms of equity compensation. Jon collaborates directly with management and compensation committees to design sound equity compensation plans, practices and procedures. He also works with companies on the valuation and financial management of their retirement and equity compensation programs, leveraging an extensive actuarial background to provide rigorous analysis of historical plan experience. Since joining Radford, Jon has worked with numerous companies in the Bay Area ranging from small private companies to large Fortune 100s. Prior to joining Radford, Jon served as a pension actuary for JPMorgan Compensation and Benefit Strategies and as National Practice Leader of its FAS 123R consulting practice. He earned a bachelor of science in mathematics and economics from the University of Washington. He is a Fellow of the Society of Actuaries and an Enrolled Actuary. Jon frequently speaks on a variety of equity compensation topics at industry events, including national and local NASPP conferences. He has also written numerous articles on topics such as performance award design, underwater exchange programs and IFRS2 accounting. Jon is based in San Francisco.

Amy Muecke of Cooley LLP specializes in the areas of executive compensation, equity compensation and employee benefits. Her experience includes designing and implementing equity incentive plans and employment, severance and other compensation-related arrangements for both private and public companies, as well as advising clients on any tax, accounting, securities, or other federal and state law issues with respect to such plans and arrangements. Her experience also includes assisting with the parachute payment analysis and other compensation and benefits issues arising in mergers and acquisitions as well as designing and implementing stock option exchange programs. Amy also assists public companies with their compensation-related disclosure in SEC filings and consults on the shareholder relations issues that arise in connection with compensation matters. She has counseled public companies on a wide range of corporate governance issues, including the issues that arise in contested director elections. She has extensive experience counseling public companies on the proxy voting guidelines of specific institutional investors and the vote recommendation policies of proxy advisory firms such as Institutional Shareholder Services (ISS) and Glass Lewis, as well as the Governance Risk Indicators, or GRId scores, that are issued by ISS. In 2003, Amy received a J.D., cum laude, from the University of San Diego School of Law, where she served as Editor-in-Chief of the San Diego Law Review. In 2000, she received a B.A., cum laude, from the University of California, Los Angeles. Amy is a member of the State Bar of California, the American Bar Association, the San Diego County Bar Association, the National Association of Stock Plan Professionals and the Society of Corporate Secretaries and Governance Professionals.

Billy Vitense joined Starbucks Coffee Company in 1996 and is based out of Seattle, WA. Billy has worked in the equity incentive industry for 14 years and most recently as the director of stock, providing

equity incentives to over 100,000 partners in 18 markets around the world. Billy holds a bachelor degree in business from the University of Wisconsin-Eau Claire.

Workshop – Understanding the Complexities of Multi-state Tax Withholding (Levels II, III)

Participants will learn first-hand about the key payroll requirements and tax reporting obligations of the employer. We will discuss the barriers to compliance as well as the risks of non-compliance with respect to payroll regulations and also the complexities multi-state employers face with income allocations and reporting of equity compensation between taxing jurisdictions. We will discuss and highlight the groups of individuals most impacted with multi-jurisdiction tax reporting requirements and provide insight as to how some organizations identify and track these employees.

Scott Schapiro is a Principal in KPMG's International Executive Services (IES) practice based in McLean, Virginia. Scott is also the Principal in Charge of KPMG's national Employment Tax practice, with over twenty five years experience in the federal and state payroll and payroll tax arena, Scott is uniquely qualified to assist in all matters of employment tax issues for companies of all sizes and industry focus.

Cody Smith is a Senior Manager in the International Executive Services practice with KPMG in Silicon Valley, serving high-tech and manufacturing clients. He is a veteran with over 17 years' experience delivering expatriate tax, payroll, and international management services. He assists organizations in their risk assessment and compliance with local jurisdictional tax laws relating to equity compensation.

Bob Woodall is a Senior Manager based in our Los Angeles office specializing in employment taxes. He has served as a senior engagement manager for multi-state tax engagements emphasizing in employment tax issues and has performed several payroll/tax reporting structure reviews for clients. His objective is to help companies achieve an optimal structure from a tax perspective, with a particular emphasis on implications for employment taxes.

Workshop – A Primer on Preparing an Account Reconciliation (Levels II, III)

Preparing account reconciliations can be tedious and time-consuming; however, they are critical to ensuring financial information is accurate, complete and consistent. This panel of seasoned professionals will provide step-by-step instructions on how to prepare a flawless account reconciliation with real life examples to help demonstrate this. You'll also leave this session with several recommended best practices for preparing account reconciliations, including how often certain accounts should be reconciled and how to deal with reconciling items. Use the tools you learn in this session to help ensure that your financial records are never misstated.

Robyn Shutak is the Education Director for the NASPP. Her responsibilities include, implementing new educational programs and coordinating webcasts on industry-related current events for the organization. Prior to joining the NASPP, Robyn was the Senior Manager, Equity Compensation for Entropic Communications, Inc. where she managed all aspects of the company's global equity programs. Robyn has also held various equity compensation related positions with several other publicly traded companies in the San Diego area such as Leap Wireless, Biosite Incorporated, Applied Micro Circuits Corporation and Jack in the Box Inc. Robyn is a Certified Equity Professional (CEP). She holds a Bachelors degree in English Literature from San Diego State University and a Paralegal Certificate from the ABA Paralegal Program at the University of San Diego. She served as the Programming Director for the San Diego Chapter of the NASPP for more than seven years and has been a member of the curriculum committee of the CEP Institute for four years.

Jim Vincent is currently the Manager, Consulting Services for E*TRADE Corporate Services. He started with E*Trade in the Application Support Department. Concentrating mostly on customer support for the Equity Edge product, he has managed both the Application Support and OptionsLink Client Services departments, and is currently the primary escalation point for software and Equity Compensation issues that arise through direct customer contact. Jim has a Bachelor's Degree in Economics from California State University, Long Beach, and is a Certified Equity Professional.

Leigh Vosseller is an active CPA currently serving as the VP of Finance for Genoptix, Inc., a specialized consultative laboratory service provider which was recently acquired by Novartis. Overall, she has over 16 years of experience in various finance and accounting positions, 11 of which have been at publicly-traded companies in high-growth industries. She began her career as a staff auditor at Deloitte & Touche LLP in Kansas City, Missouri, upon graduating with a B.S. degree in accounting from Missouri State University.

Workshop – Top 10 Practices for Small to Mid-Sized Companies (Levels I, II, III)

Speakers will discuss the Top 10 Best Practices for the small to mid-sized company perspective: tax withholding for restricted stock lapses, block trades, market volume, mobile participants, wearing too many hats, etc. The topics will be directed at some of the struggles that small to mid-sized companies face in today's equity compensation world. Company representatives will receive valuable administration processes, procedures and ideas to help them make better decisions and work in a more efficient manner. There will also be opportunities to gather insight from an experienced compensation consultant related to plan design, international processing and equity compensation hot topics.

Doug Jones is Executive Director and Head of Stock Plan Administration for UBS Corporate Employee Financial Services (CEFS). In this role he is responsible for overseeing the Plan Administration and Client Service functions, including a Quality Control and Operations Liaison function, for CEFS in both, Nashville, TN and Jersey City, NJ. Doug has a BS degree in Business with a concentration in Finance from The University of Tennessee, as well as the CEP designation, Series 9/10, 7 and 63 licenses and is a member of the National Association of Stock Plan Professionals.

Ken Scully is Compliance and Statutory Reporting Manager for Global Stock Plans for JDSU. He has been in the field of equity compensation for 14 years, working for companies that range from very small to very large, generally involved in all aspects of equity administration, including Section 16, proxy statement, global statutory reporting and compliance. Prior to joining JDSU, Ken was the Director of Strategic Solutions at Stock and Options Solutions where he performed analysis for various companies across the United States to identify best practices and make recommendations on how each company can improve their equity processes.

Craig Tanner is a Partner at Reed Smith LLP, an international law firm with offices in the US, Asia and Europe. He represents multinational companies on equity compensation, employment, and data privacy programs. In his equity compensation practice, Craig advises companies on the tax, securities, employment, currency exchange, data privacy, and communications issues that the companies encounter when offering the programs to employees, directors, and consultants throughout the world.

Fred Whittlesey is a Senior Principal with Hay Group based in San Francisco. He specializes in compensation strategy, director and executive compensation, and equity-based compensation with a primary focus on entrepreneurial companies in the technology, life sciences, and other growth sectors. Fred is a Founding Member of NASPP and past President of the NASPP Orange County Chapter; past Chair of the Advisory Board for the Certified Equity Professional (CEP) Institute; co-founder and past Board member of Global Equity Organization (GEO); and current member of the Executive Compensation Task Force of CompensationStandards.com. Fred was a top-rated faculty member and certification course developer for thirteen years for WorldatWork's "Accounting and Finance for HR Professionals" and both basic and advanced Executive Compensation courses, and delivered instruction both in classroom and online. He has authored dozens of articles in major compensation journals and periodicals and has presented his ideas at compensation conferences around the world. His recent published works include "Understanding Executive Pay Equity and Fairness: Ratios and Rationality" in WorldatWork Journal; "How Much is 'Market' Driving Global Equity Compensation Trends...and What Does 'Market' Mean?" in GEOnomics 2010; "Behavioral Economics and Equity Compensation" in GEOnomics2009; and "Measuring the ROI of Compensation Expenditures" in The Compensation Handbook. He also contributed to the CEP Institute's "GPS: Performance Awards" publication in 2010. He is the host of "Keeping Up with Fred Whittlesey," an audiocast sponsored by GEO, and is a regular contributor to The Advisors' Blog on CompensationStandards.com. Fred received his MBA from UCLA and a BA in industrial/organizational psychology from San Diego State University. He earned the Certified Equity Professional (CEP) designation from Santa Clara University, and the Certified Executive Compensation Professional (CECP) and Certified Compensation Professional (CCP) designations from WorldatWork.

Workshop – Abracadabra: Conjuring Up Administrative Solutions for Global Compliance (Levels II, III)

With the best of intentions, many companies seek to comply with local country laws when granting equity compensation abroad, and to make tax-favored equity programs available to their global employees. But when determining whether/how to offer equity compensation outside the U.S., practical administration issues and ongoing compliance costs are often overlooked. This session will discuss common system limitations and hidden costs associated with implementation and compliance in global locations. We will review solutions, lessons learned, and work-arounds successfully implemented by multinational corporations, with discussion including: maintaining tax preferential treatment in Canada and France; meeting tax and filing requirements in China, Malaysia, and Thailand; managing securities law obligations in Germany and Japan; dealing with challenging tax rules in Ireland and Hungary and special considerations for the non-US parent company, as issuer.

Tracy de Swiet is Managing Director and West Coast Practice Leader of Independent Stock Plan Advisors LLC (ISP Advisors), an equity plan consulting firm with offices in the greater Boston area and in Silicon Valley. Tracy has ten years of experience in global equity compensation consulting; prior to joining ISP Advisors, Tracy was a Senior Equity Compensation Consultant with Stock & Option Solutions (SOS), and a Tax Manager for six years in Ernst & Young's Global Equity practice. She also gained extensive experience in brokerage services and HR consulting in London and Moscow. Tracy received a BA in International Politics & Economics from Middlebury College.

Jon F. Doyle advises multinational companies on global equity compensation programs. He has extensive experience advising businesses on the tax, securities, foreign exchange, labor, data privacy, and e-commerce issues they may encounter in each country where they offer stock option, stock purchase, restricted stock, phantom stock, stock appreciation right, cash bonus, venture capital, and directed share plans to their employees, directors, and consultants.

Christie Lincoln is the sole Stock Administrator at Sanmina-SCI since October 2008. Sanmina-SCI has global multinational stock plans issuing multiple stock programs and designs, through the Equity Edge system. She manages all aspects of the Company's equity compensation plans: Stock Options, Restricted Stock, and Employee Stock Purchase Plan. In November 2010, Christie received the designation of Certified Equity Professional, and has a Bachelor's Degree in Animal Science from Cornell University in Ithaca, NY.

Jacobin Zorin is Legal & Equity Programs Manager at Verigy Ltd., a Singapore semiconductor test equipment company at their Cupertino, California office. She has 15 years of experience in global equity compensation and corporate legal affairs. At Verigy, she manages the company's global equity programs as well as handling day-to-day corporate filings with the SEC including Section 16 reports, Registration Statements on Forms S-4 and S-8, quarterly reporting on Forms 10-Q and 10-K, current reports on Form 8-K and proxy statements. Jacobin is a CEP, member of NASPP and GEO and volunteer for the CEPI and NCEO; she serves on the Program Committee of the Silicon Valley Chapter of NASPP. She holds two bachelors degrees in history and political science.

Workshop – Cost Basis Reporting: Navigating the Administrator – Transfer Agent – Broker Minefield (Levels I, II, III)

Cost basis reporting, while providing helpful tax information to participants in 2011 and forward, is fraught with implementation challenges for employee awards. Part of the difficulty is in the range of reporting methods allowed by the regulations, the other is determining which of your vendors – or maybe you – are responsible for tracking and transferring cost basis information. Hear from both tax and operational perspectives what is working and what doesn't--and what plans you should be making to comply.

Josh McGinn is a Senior Relationship Manager and Vice President at BNY Mellon Shareowner Services with more than 24 years of industry experience. In his current role, Josh manages shareholder services for premier corporate issuers and IPOs out of the San Francisco office. Prior to joining the BNY Mellon organization in July of 2007, Josh was with EquiServe, based in Boston. There he was involved with planning, developing and administering a wide range of services, including forward and reverse stock splits, acquisitions involving both stock and cash exchanges, corporate spin-offs, implementing and administering Direct Stock Purchase Plans, assisting clients with DRS and full dematerialization programs and while working at Bank of Boston, helped develop the company's first book-entry ESPP Program. Josh received both his Bachelors and MBA degrees from Boston University, has earned his Series 7 License and his CEP designation. He is a member of the Society of Corporate Secretaries and Governance Professionals, Shareholder Notice and Access Forum, has lectured at San Francisco University, has written for the NCEO and is a frequent attendee and occasional speaker at NIRI and NASPP meetings.

Andrew Schwartz of BNY Mellon has over 10 years of experience with the taxation of employee plans, and is dually employed by BNY Mellon's transfer agency business and its brokerage subsidiary BNY Mellon Capital Markets LLC (Member FINRA/SIPC). Since 2008, Andrew has been serving as BNY Mellon's lead representative to the Securities Transfer Association's cost basis subcommittee, and provided critical assistance to the transfer agency and employee plan administration groups on the developing rules and their implications. He has spoken at several industry events on the new cost basis reporting rules, and authored detailed articles on tax topics for the STA, NASPP, and NCEO. He also oversees the Executive Services team, delivering specialized products and services to SEC Section 16 executive officers and executing Rule 144 stock sales across all Shareowner Services' business lines. Before joining one of BNY Mellon's predecessor companies in 1997, Andrew was employed at Deloitte & Touche LLP, where he specialized in investment product and individual taxation issues. Andrew earned

an M.B.A. in Taxation from the Stern School of Business at New York University, and a B.A. from the University of California at Davis. He has been a Certified Public Accountant since 1992, earned the CEP designation in 2002, and holds FINRA Series 7, 24, 63, and 66 licenses. He is a member of the AICPA, NCEO, and NASPP.

Workshop – Pumping Up Purchase Plans: Re-Thinking the ESPP (Levels I, II, III)

The humble ESPP doesn't grab headlines or dazzle the crowds with lights and action, but these historically underappreciated and underserved equity plans could be making a quiet comeback. Never excessive, always in the money, and scoring big points on expense efficiency, it's time to re-think the ESPP. This panel will tidily wrap up the new perspectives on ESPP, including design concepts, accounting perspectives, legal and administrative considerations, data on ESPP trends and design features, and gotchas to watch out for with respect to the regulations and inadvertent plan disqualification. We'll top it off with a passionate issuer perspective to ensure attendees leave with a new perspective on ESPP.

Barbara Baksa has over fifteen years experience in equity compensation and currently serves as Executive Director for the National Association of Stock Plan Professionals. She is a frequent speaker on equity compensation related topics, has contributed chapters to four books on equity compensation, and authored the book "Accounting for Equity Compensation," published by the NCEO. Barbara also serves as editor of *The NASPP Advisor* and co-editor of *The Corporate Executive* and is a member of the CEP Advisory Board.

Mathew Roberts is the Vice President of Financial Reporting and Industry Relations at Fidelity Stock Plan Services. He has worked in accounting, equity compensation and client services throughout his career, giving him a unique perspective in meeting the needs of plan sponsors. In his current position as Vice President of Financial Reporting and Industry Relations, Mathew oversees the development and delivery of equity compensation financial reporting solutions for Fidelity Stock Plan Services. Prior to Fidelity, Mathew worked within PricewaterhouseCoopers LLP's Systems Process and Assurance Group with Financial Services clients across the US.

Anne Silver has been at Equinix, Inc. for the past 4 years and is currently Stock Services Manager. She handles the processing, reporting, data base maintenance for stock options, RSUs and ESPP. She has implemented online ESPP enrollment and online grant/award agreements. She has been in the field since 1990 when she used ShareData's OTC. Prior to Equinix, she was an independent stock administration consultant to companies such as salesforce.com, Electronic Arts, Caladus, Extreme Networks and many others. She worked for 4 years each as Stock Administrator at Legato Systems and as Stock Plans Manager at Veritas. She has been active on the executive committee of SVC NASPP and served as its President for two years. She has also been a member of the CEPI Certification Council. Anne holds a BA from the University of Pennsylvania, an MS from San Jose State University and earned her CEP in 1996.

Alison Wright, Partner, Baker & McKenzie LLP, practices in the area of executive compensation and employee benefits law. She is the chair of the membership committee of the San Francisco Chapter's Western Pension & Benefits Conference. Ms. Wright is also a frequent speaker and author on topics related to her practice. Ms. Wright's practice focuses on the tax, securities and ERISA aspects of executive and equity compensation. These include nonqualified deferred compensation plans, stock compensation plans, employee stock purchase plans, change in control plans, as well as perquisite programs, executive employment and severance agreements. For nearly 15 years, she has been advising clients regarding their traditional employee benefit plans—including 401(k) and other retirement

plans—health and welfare plans and cafeteria plans. In addition, Ms. Wright has significant experience in assisting clients with compensation and benefits issues raised in mergers and acquisitions, including golden parachute payments, COBRA responsibilities and due diligence review.

Workshop – The Next Generation of Performance Plans: Fixing the Governance Ups and Downs (Levels II, III)

Performance share units and other varieties of performance-based full-value awards have grown in prevalence in response to a series of corporate governance concerns over stock options, time-vested awards, and executive ownership levels. While performance plans resolve some governance issues, they are creating new governance challenges which are not always apparent or easy to identify and measure. The new say-on-pay environment has turned the commentary on these plans from anecdotal issues to a chorus of complaints about the manner in which these plans have been designed and operated over the past few years and the resulting impact on corporate governance. This session outlines the issues that have been addressed by performance plans and those have been created with current practices, and how a new generation of performance plans will emerge to address the heightened attention to these problems in the say-on-pay environment. Examples of actual plan design, operation, administration, and accounting issues will be presented along with a set of solutions.

Elizabeth Dodge is the Vice President of Product Management for Stock & Option Solutions, Inc. (SOS). Her responsibilities include monitoring new developments in the equity compensation arena, performing market research, speaking at industry events, helping to define the product roadmap for SOS, and helping clients solve their equity compensation challenges. Elizabeth joined SOS in 2008, and has been designing solutions and software specific to equity compensation challenges since 1998.

Takis Makridis is the head of the Equity Methods Consulting Group, a Bank of America Merrill Lynch company. In his role, he oversees client delivery, operations, sales, marketing, and R&D. Takis has worked closely with finance and HR executives to address their equity compensation accounting, valuation, and financial reporting needs, and remains critically engaged with thought-leaders from consulting firms, public accounting, and academia in addressing emerging issues. Takis is a nationally recognized speaker at industry conferences across the country and frequently leads executive briefing sessions and firm webinars to enhance knowledge sharing among client firms and disseminate best practices throughout the industry. Takis is the author of *Advanced Topics in Equity Compensation Accounting* and coauthor (with Barbara Baksa) of *Accounting for Equity Compensation* (third – fifth edition), both published by the National Center for Employee Ownership, which have been required texts for the Certified Equity Professional (CEP) designation.

Fred Whittlesey is a Senior Principal with Hay Group based in San Francisco. He specializes in compensation strategy, director and executive compensation, and equity-based compensation with a primary focus on entrepreneurial companies in the technology, life sciences, and other growth sectors. Fred is a Founding Member of NASPP and past President of the NASPP Orange County Chapter; past Chair of the Advisory Board for the Certified Equity Professional (CEP) Institute; co-founder and past Board member of Global Equity Organization (GEO); and current member of the Executive Compensation Task Force of CompensationStandards.com.

Brit Wittman leads a global team responsible for the design, implementation and administration of all variable, equity and executive compensation programs for the 80,000+ employees of Intel. Additionally, Brit is responsible for the relationship with the Compensation Committee of the Board of Directors. Brit is a member of the faculty for WorldatWork. He has served as the Chairman of the WorldatWork Executive Rewards Advisory Board and is a former Board member of the National Center for Employee Ownership.

Workshop – It’s Time to Play Stock Plan Check-Up – Is Yours in Good Health? (Levels I, II, III)

From taxes to compliance to risk management, there’s a lot of knowledge required to be a successful stock plan administrator – do you have what it takes? This session is a fun way to test your general stock plan administration knowledge, determine the current health of your stock plans and win some prizes and bragging rights in the process. Join us for an interactive game show that will ask you a series of hypothetical questions to determine the health of a fictional plan, while also giving you a better knowledge of what controls should be in place for the administration of your real plans.

Rachel Murillo is the Editorial Director at the NASPP and the Treasurer for the NASPP’s Sacramento chapter. She has been administering stock plans since 2003. Rachel graduated from the University of Oregon with a BA in Chinese Studies and became a Certified Equity Professional in 2005. She also volunteers regularly for the Certified Equity Professional Institute and received a Volunteer Excellence Award from the CEPI in 2010.

Joe Purdy, Senior Product Manager, is a member of Solium Transcentive’s Product Management team managing the Express Equity Suite applications including Express Options and Express Stock Purchase. He specializes in topics ranging from customizing reports to financial reporting. Joe has been with Solium Transcentive for 11 years and has served in various client services roles including support specialist, plan administrator, training/consultant and manager of the financial reporting technical department. He is a frequent speaker at Solium Transcentive’s Annual Conference and various external panels including the NASPP. Joe earned his CEP designation in 2005 and is an officer for the Connecticut Chapter of the National Association of Stock Plan Professionals (NASPP).

Angel Toussaint has served as the Stock Plan Administrator for Oclaro, Inc. since 2005. She recently managed the implementation of the MSSB/Solium Transcentive utility to offer Oclaro employees the convenience of online stock trading. Oclaro currently uses Express Options as its equity software and Angel manages the software in-house, developing custom reports for auditors, human resources, and finance. Angel also serves on Solium Transcentive’s Client Advisory Board and is currently pursuing her CEP certification. Angel attended University of Alaska and is currently attending Argosy University pursuing her BS in Business and Psychology.

Christine Zwering has over 15 years of experience administering equity compensation programs. Currently, she provides independent consulting services to companies and industry service providers. Ms. Zwering is a regular speaker and author on various equity compensation issues. She obtained her Certified Equity Professional designation in 2000 and is currently a member of the executive committee for the San Francisco chapter of the National Association of Stock Plan Professionals (NASPP).

Workshop – Claw-Back provisions in the US and Around the Globe – An Overview of the Legal, Tax, Accounting and Administrative Issues (Levels II, III)

This presentation will discuss the legal, tax, accounting and administrative issues related to claw-back provisions in the equity award context. We will cover claw-back provisions that have been required under TARP and which will most likely become required under the Dodd-Frank Act as well as other types of claw-back provisions which many companies have started to implement (often tied to non-compete provisions). We will discuss the enforceability of such provisions, both in and outside the US and provide an analysis of the accounting implications of these provisions (both under GAAP and IFRS 2). We will also provide an overview of the valuation of non-compete related claw-backs for purposes of Section 280G.

Jon Burg is vice president and West Coast Practice Leader of Radford Valuation Services, the equity valuation group of Radford, an Aon Hewitt Company. He has twelve years of benefits and compensation consulting experience, including all forms of equity compensation. Jon collaborates directly with management and compensation committees to design sound equity compensation plans, practices and procedures. He also works with companies on the valuation and financial management of their retirement and equity compensation programs, leveraging an extensive actuarial background to provide rigorous analysis of historical plan experience. Since joining Radford, Jon has worked with numerous companies in the Bay Area ranging from small private companies to large Fortune 100s. Prior to joining Radford, Jon served as a pension actuary for JPMorgan Compensation and Benefit Strategies and as National Practice Leader of its FAS 123R consulting practice. He earned a bachelor of science in mathematics and economics from the University of Washington. He is a Fellow of the Society of Actuaries and an Enrolled Actuary. Jon frequently speaks on a variety of equity compensation topics at industry events, including national and local NASPP conferences. He has also written numerous articles on topics such as performance award design, underwater exchange programs and IFRS2 accounting. Jon is based in San Francisco.

Sinead Kelly is a Partner in the San Francisco office of Baker & McKenzie LLP and a member of the Firm's Global Equity Services Group. Sinead advises multi-national companies in the global implementation and maintenance of their equity compensation plans. She has authored articles and given presentations on various global equity topics. She received her LL.M. from the University of California Hastings College of the Law and her LL.B. in Law and Accounting from Queen's University of Belfast.

Barbara Klementz is a Partner in the San Francisco office of Baker & McKenzie LLP and a member of the Firm's Global Equity Services Group. She advises multinational companies on implementing their international equity compensation programs. Barbara also frequently advises with respect to the treatment of such programs in corporate spin-offs and other corporate transactions, as well as on the tax treatment of cross-border employees. Barbara regularly speaks on international equity issues, and has authored several articles on this topic.

Continuing Education Credit

Certified Equity Professionals (CEP) are entitled to earn up to 6.25 hours of continuing education credit. CEP designees are required to complete and report 30 hours of industry-related continuing education (CE) every two years in order to continue using the CEP designation. No certification of attendance of the SVC NASPP All-day is required. Simply complete the Continuing Education Reporting Form. For more information, visit the CEPI website:
http://www.scu.edu/business/cepi/stay_current.cfm

Certified Public Accountants (CPA) are entitled to earn up to 7.50 hours of continuing education credit. Program levels for Conference sessions are designated in each workshop description with the notation I for basic, II for intermediate, and III for advanced. Sessions designated as basic (I) have no prerequisites and are designed for individuals new to the topic or those with limited experience. Intermediate sessions (II) build upon topics discussed in the basic program and are suited for individuals with 3-5 years experience in the field or commensurate education. Advanced sessions (III) are most useful for individuals with more than 5 years experience or commensurate education in the designated topic. These sessions focus on the development of in-depth or specialized knowledge. The instructional method for the Conference is group-live and there is no required advanced preparation.

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