



Outsourcing, Consulting and Corporate Training for Equity Compensation

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### **Position/Title: Senior Equity Consultant – (Revised)**

The person must have superior knowledge of all aspects of the laws and regulations of Equity Compensation for a global company. This includes Equity Compensation securities laws, tax laws, the financial reporting requirements for equity and related accounts, and advanced knowledge of the new accounting regulations in order to properly manage and perform the basic and advanced responsibilities surrounding our company's equity plans.

WE WILL TRAIN! An opportunity for the right candidate to move to another level of your career. We will consider candidates who have knowledge but may not have full experience in all areas.

The Sr. Equity Consultant responsibilities include the full scope of Sr. Equity Plans Manager and not limited to (see Equity Plans Mgr position):

- Public and private company stock plans administration and management
- Knowledge of two or more software applications (EASi, Equity Edge, CapMx, Equity Focus, Transcentive)

The Sr. Equity Consultant position must have experience in equity comp projects:

- IPO transition
- Pre-IPO and private company administration
- Financial analysis for equity compensation – overhang, ratios, expense forecasting
- External reporting: 10-Q, 10-K, financial footnotes, Proxy Statement
- Activity for mergers / acquisitions / liquidations
- Stock database conversions
- Stock splits and recapitalizations
- Reconciliations
- Analysis of equity data for 409A issues
- Write or edit the Sarbanes-Oxley documentation for the Equity Plans corporate function
- Transition from one vendor/agent to another: Transfer Agent, Stock Broker, Out-Sourcing Vendor, Escrow Agent, Legal Counsel
- Perform project work and equity consulting tasks anticipating the needs of the client's executive team, management team and the employee base

Job requirements for Sr. Equity Consultant:

- 8+ years experience in corporate stock plan administration and management
- Management experience
- Consulting experience
- Finance or accounting background, education, or experience is preferred
- Take-charge person that can handle a variety of tasks and responsibilities
- Must be organized and efficient
- Enjoys multi-tasking
- Writing skills for citing regulations and writing narratives for work processes
- Must have excellent English written and oral communication skills
- Certified Equity Professional (CEP) designation required
- Must have a bachelor's degree or equivalent experience
- Proficiency in Excel and Word

**Qualified candidates please specify the position to which you are applying and email your resumé to: [TeresaL@Equity-Strategies.com](mailto:TeresaL@Equity-Strategies.com)**