

# Welcome to Computershare's Enhanced Equity Plan Offering: EquatePlus



Can't watch the video?

## Welcome to Computershare's Enhanced Equity Plan Offering: EquatePlus

To simplify plan administration and enhance your participant engagement, we're strengthening our offering with market-leading technology, EquatePlus.

Computershare is committed to providing our clients with industry leading solutions and providing upgraded services and capabilities that represent the next generation of digital innovation.

In this guide, you will find an overview of EquatePlus' new features, designed to power the effective administration of your share plans throughout the entire plan life cycle. These features include our enhanced corporate experience, improved communication services, reporting direct, and a new mobile app for participants.

EquatePlus, powered by Computershare, represents a significant investment on our part. Both you and your participants will benefit greatly from this platform - we'll be upgrading our clients as soon as we can.

**Please choose a section in the purple bar above to begin.**

## Enhanced Corporate Experience

### Key Benefits:

Corporate Administrator Portal Dashboard

Real-Time View of Participant Experience

Real-Time Data Management

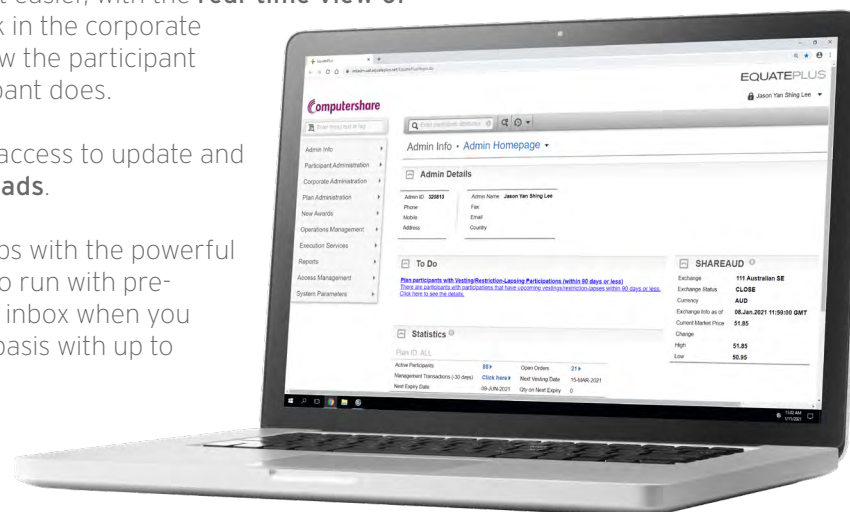
Reporting Direct

Employee Lifecycle Tool

## Enhanced Corporate Experience

The corporate administrator portal puts you firmly in control of your plans. With powerful capabilities and a modern and intuitive platform, administering your plans is simple.

- Everything you need in a single view, thanks to the **corporate portal dashboard**. A new landing page with real time statistics, administrator to do list and company share information giving you everything you need on one page.
- Answering participant queries just got easier, with the **real-time view of the participant experience**. One click in the corporate administrator portal allows you to view the participant portal exactly as an individual participant does.
- Be in control of your data with direct access to update and monitor by using **real-time data uploads**.
- Real time reporting is at your fingertips with the powerful **Reporting Direct**. Schedule reports to run with pre-set filters, delivered straight into your inbox when you choose, or run reports on an ad-hoc basis with up to date data.
- Plan ahead and project impacts on participant holdings as a result of their departure with the **Employee Lifecycle Tool**.



Enhanced Corporate Experience

### Key Benefits:

## Corporate Administrator Portal Dashboard

Real-Time View of Participant Experience

Real-Time Data Management

Reporting Direct

Employee Lifecycle Tool

## Corporate Administrator Portal Dashboard

A new landing page with real time statistics, administrator to do list and company share information giving you everything you need on one page.

The screenshot displays the Corporate Administrator Portal Dashboard. The interface includes a left sidebar with navigation links, a top header with the Computershare logo and user profile, and a main content area with sections for Admin Details, To Do, and SHAREAUD statistics.

**Computershare** EQUATEPLUS

Jason Yan Shing Lee

Enter menu text or tag

Enter participant attributes

Admin Info • Admin Homepage

**Admin Details**

Admin ID	320813	Admin Name	Jason Yan Shing Lee
Phone	+61 03 9415 5000	Fax	+61 03 9473 2500
Mobile	+61 03 9415 5000	Email	jason.lee@shareaud.com.au
Address	Yarra Falls, 452 Johnston Street, Abbotsford VIC 3067	Country	Australia

**To Do**

[Plan participants with Vesting/Restriction-Lapsing Participations \(within 90 days or less\)](#)  
[There are participants with participations that have upcoming vestings/restriction-lapses within 90 days or less. Click here to see the details.](#)

**Statistics**

Plan ID: ALL

**SHAREAUD**

Exchange	111 Australian SE
Exchange Status	CLOSE
Currency	AUD
Exchange Info as of	08.Jan.2021 11:59:00 GMT
Current Market Price	51.85
Change	
High	51.85
Low	50.95

Enhanced Corporate Experience

Key Benefits:

Corporate Administrator Portal Dashboard

Real-Time View of Participant Experience

Real-Time Data Management

Reporting Direct

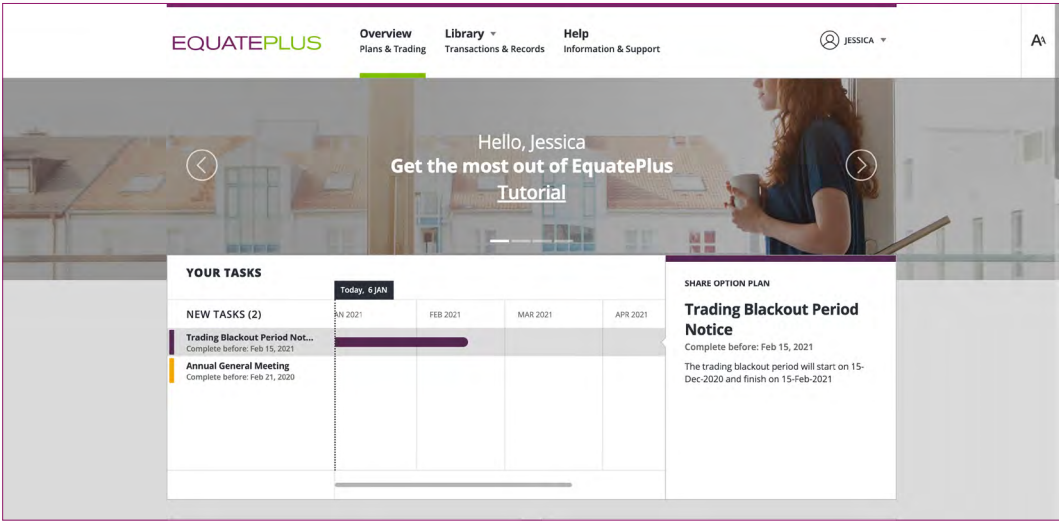
Employee Lifecycle Tool

Real-Time View of Participant Experience

Answering queries just got easier with the ability to view the participant portal exactly as a participant does, with a single click.

Using the search function, it's easy to find an individual using their participant ID or their name. Once that participant is selected, simply click the submenu to go directly to the participant portal and view their account.

This short video shows how you can search for a participant and go to the participant portal with a single click.



Enhanced Corporate Experience

### Key Benefits:

Corporate Administrator Portal Dashboard

Real-Time View of Participant Experience

## Real-Time Data Management

Reporting Direct

Employee Lifecycle Tool

## Real-Time Data Management

Stay in control of your participant data with real-time updates directly into your corporate administrator portal. You can update or edit either by file upload or by individually editing a participant on screen.

You can quickly and efficiently update static information, share allocations and leaver details for multiple participants via the corporate administrator portal. Uploading data files via the portal allows you to apply your updates straight away.

The screenshot displays the EquatePlus Corporate Administration portal. The top navigation bar includes the Computershare logo, a search bar for participant attributes, and a user profile for Nicola Foo. The main content area is titled 'Corporate Administration • Corporate Data Interface • Upload Data Files'. It features a sidebar menu with options like Admin Info, Participant Administration, Corporate Administration, Plan Administration, New Awards, Operations Management, Execution Services, Reports, Access Management, and System Parameters. The main panel shows 'Instructions' for uploading data files, followed by an 'Upload' section with fields for selecting a file, providing a reference/comment, and choosing a data class. An 'Upload Data File' button is at the bottom.

**Computershare** EQUATEPLUS  
Nicola Foo

Enter menu text or tag

Enter participant attributes

Corporate Administration • Corporate Data Interface • [Upload Data Files](#)

**Instructions**

1. Select the Data File that you wish to upload.
2. Supply a reference or comment, such as: 'Employee data from US as of January'.
3. Select the Data Class.

Please note: Large files may take a significant amount of time to upload. Do not reload such files!

**Upload**

Select Data File to Upload \*  No file chosen

File Reference / Comments \*

File Data Class \*

Enhanced Corporate Experience

### Key Benefits:

Corporate Administrator Portal Dashboard

Real-Time View of Participant Experience

Real-Time Data Management

## Reporting Direct

Employee Lifecycle Tool

## Reporting Direct

We understand how important it is for you to have accurate and reliable reporting available at any time. Our new enhanced offering gives you flexibility and control over the information you need.

Reporting Direct offers an efficient experience for you and your payroll team, enabling you to:

- Access real-time data, whenever you need it
- Schedule reports to run with pre-existing filters, delivered straight to your inbox
- Run reports on demand. All reports can be filtered by your own specified criteria, to narrow in on what you need to know, and these filters can be saved for reuse
- Limit viewing of restricted information by setting up data access rights for each administrator



This short video shows you how you can schedule reports with pre-set filters or run reports on demand.

Enhanced Corporate Experience

### Key Benefits:

Corporate Administrator Portal Dashboard

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Real-Time Data Management

Reporting Direct

## Employee Lifecycle Tool

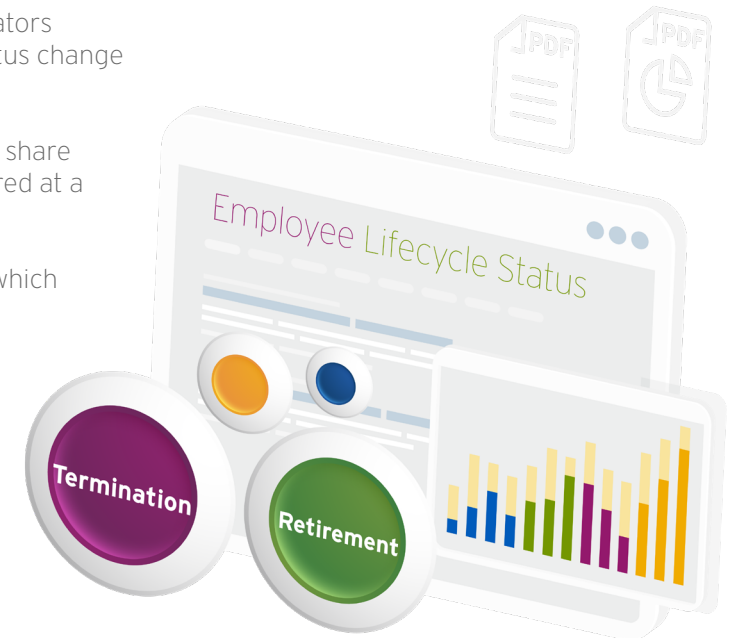
## Employee Lifecycle Tool

When analysing future participant leaver scenarios, it can take some work on your part to understand their share plan entitlement. For this reason, we're introducing a new **Employee Lifecycle Tool**, to project participant holdings and reduce the manual effort in planning ahead for leaver events.

Employee Lifecycle is an online tool that helps administrators quickly and simply view the effect of an employment status change on a participant's share allocation.

Administrators can also check what would happen to the share allocation of a participant if they were terminated or retired at a specific date.

All modelling results can be exported and saved to PDF, which makes it easier for you to respond to queries from your participants.





## Enhanced Participant Experience

### Key Benefits:

Participant Website Upgrade

Participant Actions

Participant Support

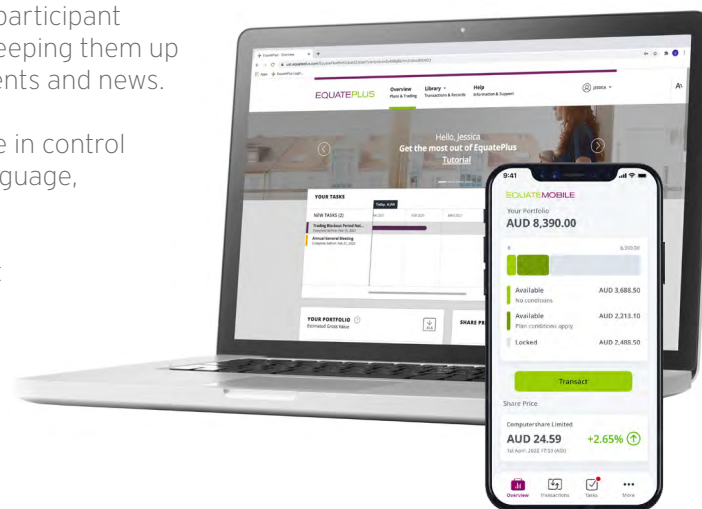
Mobile App

## Enhanced Participant Experience

All participants will have their accounts automatically upgraded, providing them with the flexibility to manage their plans online anywhere, anytime.

### The enhanced participant account includes:

- **Mobile app** - Your participants can engage with their share plans anytime, anywhere, with the Mobile App. It offers a clear overview of portfolio and share values, and participants can execute transactions confidently and quickly.
- **Participant portal homepage** - Enhance participant engagement with customisable banners, keeping them up to date on company specific share plan events and news.
- **Account personalisation** - Participants are in control of their account with personalisation of language, currency and time zone.
- **Participant Support** - Participants can get help with ease using the HelpChat & phone support service.



Enhanced Participant Experience

Key Benefits:

Participant Website Upgrade

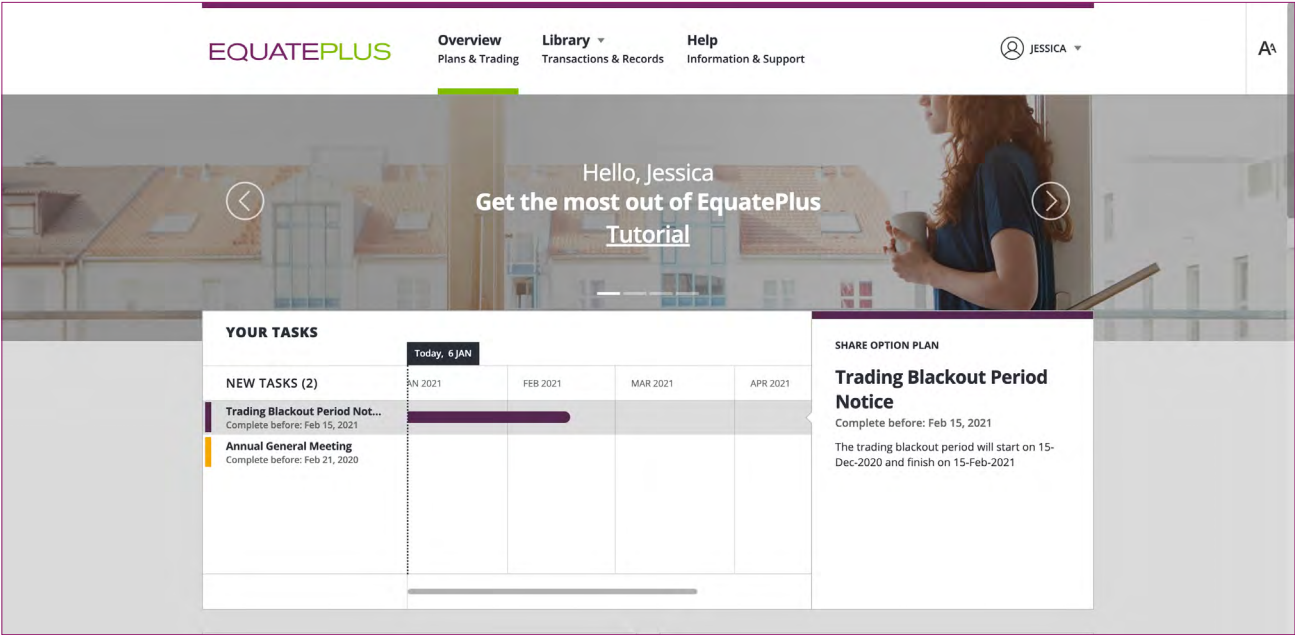
Participant Actions

Participant Support

Mobile App

Participant Website Upgrade

The participant portal provides clear navigation options, making it easy for participants to access everything they need. Watch a short video to find out more about the participant portal.



Enhanced Participant Experience

Key Benefits:

Participant Website Upgrade

Participant Actions

Offer Enrolment

Performance Vesting

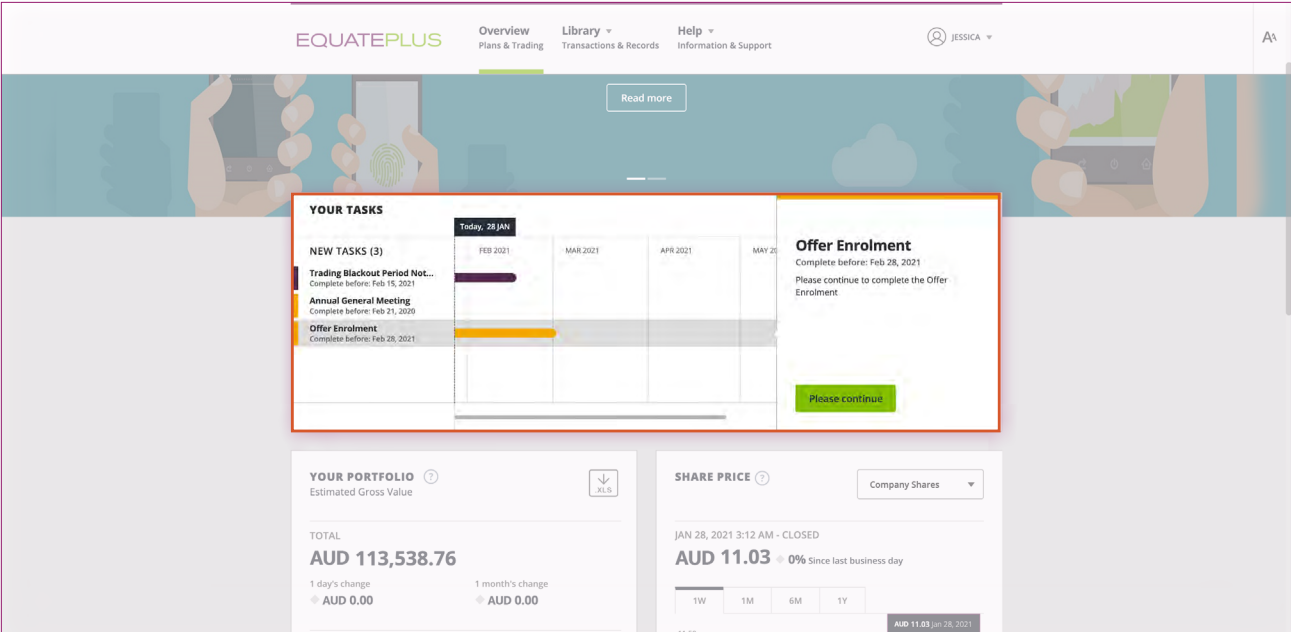
Exercise/Sell

Participant Support

Mobile App

Offer Enrolment

Offer enrolments can be completed with just a few clicks in the ‘**Task Manager**’ section. Participants can easily modify, view and print their saved offer enrolments whenever they need in the ‘**Library**’ section.



Enhanced Participant Experience

Key Benefits:

Participant Website Upgrade

Participant Actions

Offer Enrolment

Performance Vesting

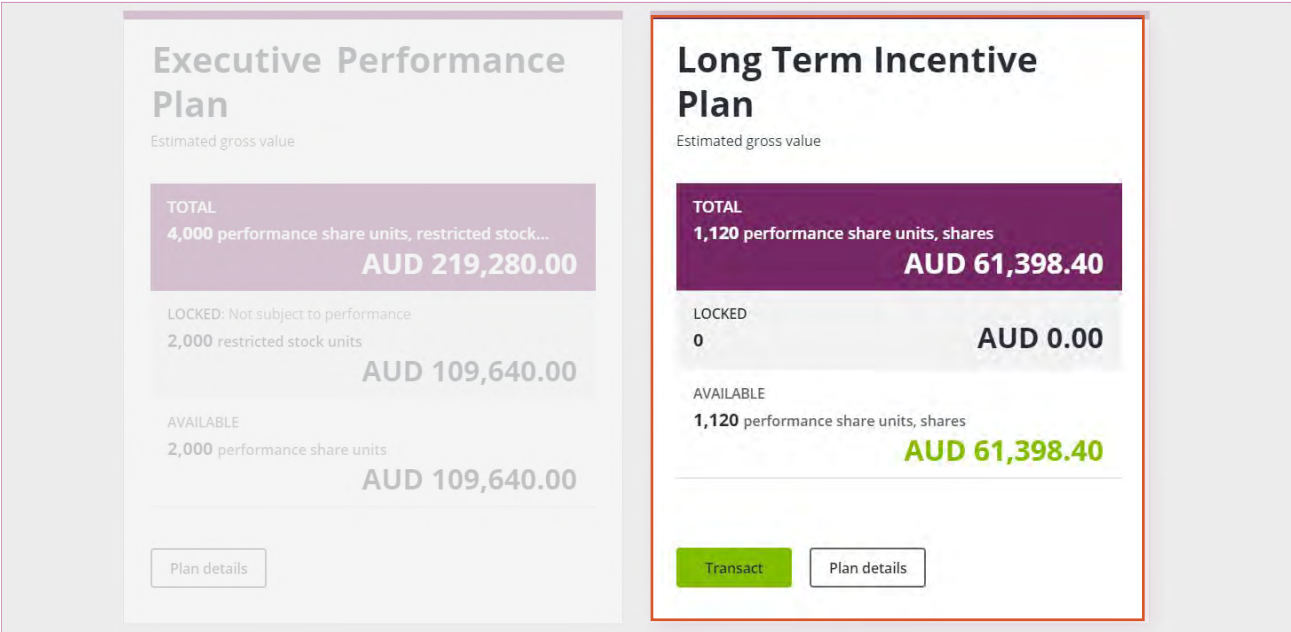
Exercise/Sell

Participant Support

Mobile App

Performance Vesting

Participants can view the total value of their Performance Share Plan on the Overview page, and access further details by clicking the 'Plan Details' link.



Enhanced Participant Experience

Key Benefits:

Participant Website Upgrade

Participant Actions

Offer Enrolment

Performance Vesting

Exercise/Sell

Participant Support

Mobile App

On the Plan Details page, participants can see the estimated value of their Performance Share Units that are linked to current performance.

TOTAL

AUD 219,280.00

4,000 performance share units, restricted stock units

LOCKED

AUD 109,640.00

2,000 restricted stock units

AVAILABLE

AUD 109,640.00

2,000 performance share units

?

AVAILABLE

Performance Share Units

Australian Share

Quantity

2,000

Estimated value

AUD 109,620.00

Market price AUD 54.81 as of Jan 28, 2021 (Australian SE)

See more ▾

Enhanced Participant Experience

Key Benefits:

Participant Website Upgrade

Participant Actions

Offer Enrolment

Performance Vesting

Exercise/Sell

Participant Support

Mobile App

Exercise/Sell

Participants can initiate a transaction directly from the Overview page for the respective plan module by clicking the green 'Transact' button.

### Share Option Plan

Estimated gross value

TOTAL	6,000 options	AUD 59,160.00
LOCKED	5,000 options	AUD 49,300.00
AVAILABLE	1,000 options	AUD 9,860.00

Transact

Plan details

### Restricted Stock Unit Plan

Estimated gross value

TOTAL	3,562 restricted stock units	AUD 39,039.52
LOCKED	3,562 restricted stock units	AUD 39,039.52
AVAILABLE	0	AUD 0.00

Transact

Plan details

Enhanced Participant Experience

### Key Benefits:

Participant Website Upgrade

Participant Actions

## Participant Support

Mobile App

## Participant Support

Getting help has never been easier with the addition of two fast and convenient services - HelpChat and phone support . Participants can get the answers they need, faster than ever before.



### Convenient and reliable

- Help is only a phone call away thanks to our comprehensive **Phone Support** service, providing quick and effective assistance to participants when they need it.



### Fast and efficient

- Skip the authentication process with **Instant ID**, a single-use authentication code that helps participants get verified and get back to business.



### Helpful and Interactive

- Get immediate online assistance with **HelpChat**. Convenient access through the participant portal.

HelpChat

ENGLISH DEUTSCH

Select topic: ▼

Please describe the issue

Agent will be available in:  
about 5 minutes

☐ I agree to [terms and conditions](#)

JOIN THE QUEUE

HelpChat helps participants quickly find a resolution

Coming Soon

Enhanced Participant Experience

### Key Benefits:

Participant Website Upgrade

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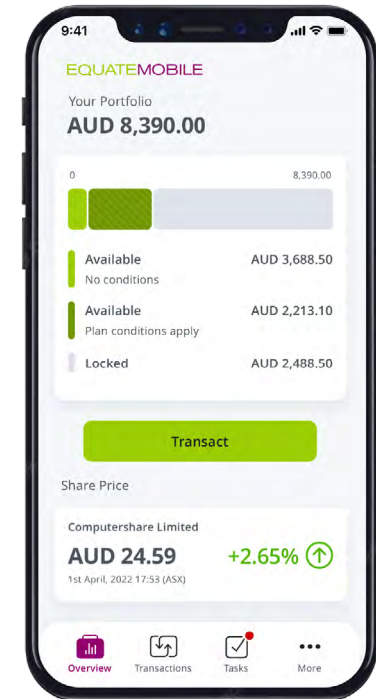
## Mobile App

## Mobile App - EquateMobile

Participants are empowered to engage anytime, anywhere with our new mobile app.

Equipped with an array of benefits and features, the app gives participants everything they need at their fingertips.

- Portfolio view
- Plan details
- Real-time trading
- Offer enrolment
- Purchase plan elections
- Push notifications





Enhanced Participant Experience

Key Benefits:

Participant Website Upgrade

Participant Actions

Participant Support

Mobile App

EquateMobile Features

Powerful tools	Ease of use	Engaging
<div><div>› Portfolio values</div><div>› Portfolio historical value chart</div><div>› Overview of all plan transactions, including elections, enrolments, acceptances and grants</div><div>› Document library</div></div>	<div><div>› Two-step login and Touch ID login</div><div>› State of the art security</div><div>› Bank account maintenance</div><div>› Choice of languages*</div><div>› Access to Contact Centre</div><div>› Trading and pending transaction management</div></div>	<div><div>› Push notifications</div><div>› Purchase plan elections</div><div>› Grant acceptances</div><div>› Customised elections</div><div>› Vesting elections</div><div>› Dual language support for English and Simplified Chinese</div></div>

\*From English, German, Italian, Spanish, French, Dutch, Portuguese, and Simplified Chinese

## Enhanced Participant Experience

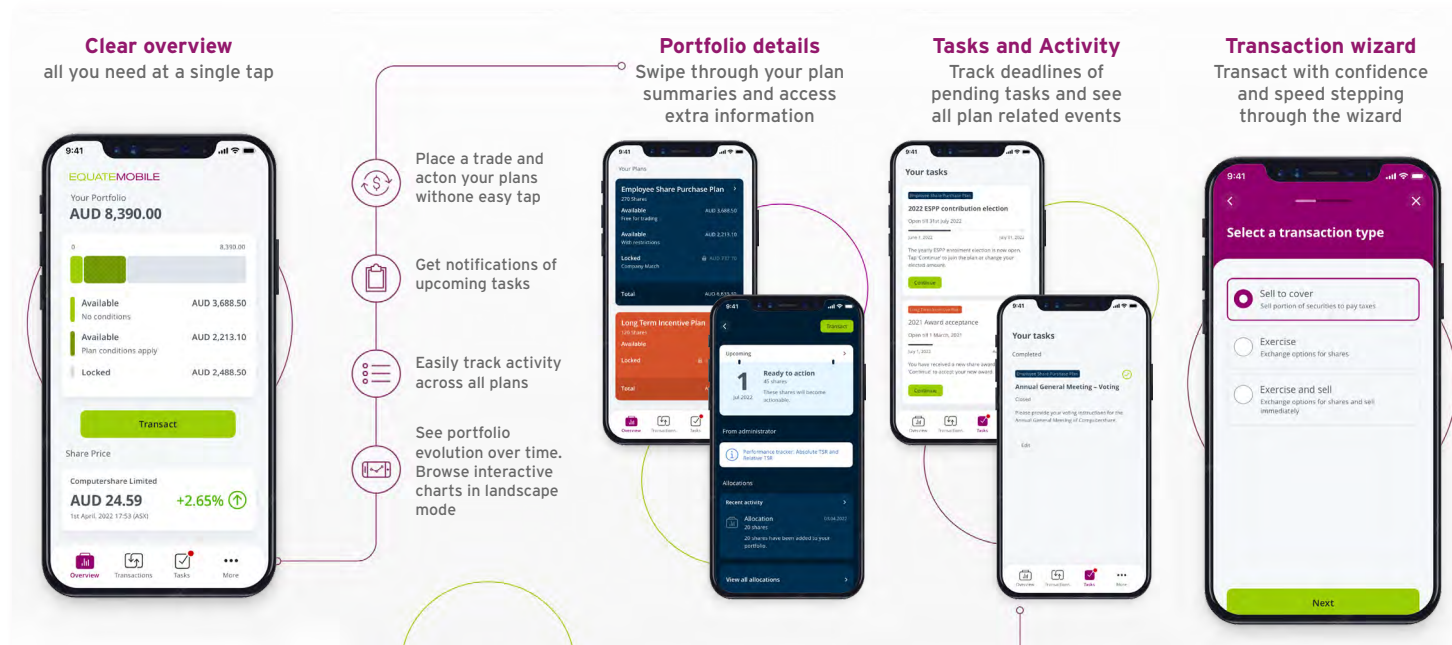
## Key Benefits:

Participant Website Upgrade

Participant Actions

Participant Support

## Mobile App



## Next Steps

EquateMobile is an optional service. If you're interested in offering this service to your participants, please contact your Relationship Manager for more information.

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## Get More Out of Your Share Plan

Enhance your share plan administration and your participants' experience with our value-added products – all designed to support a world class experience for share plan administrators.

Choose a subsection in the left hand navigation menu to continue.



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## Mobile App - EquateMobile

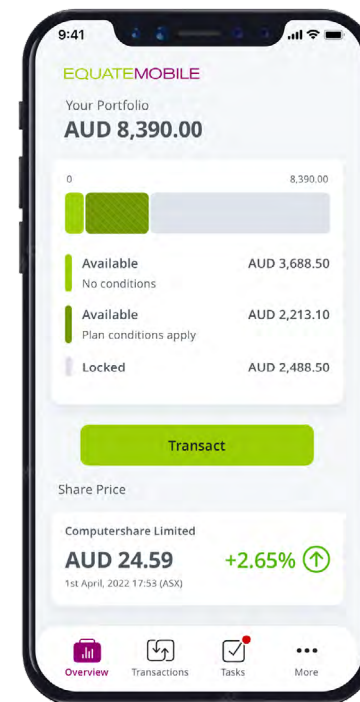
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- Portfolio view
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- Push notifications

## Next Steps

If you are interested in this service please contact your Relationship Manager for more information.



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## Digital Communication

Computershare's video communications bring your share plans to life, giving your participants a clear understanding of their awards in an engaging format.

When it comes to educational communication, numerous studies have confirmed that humans process visual information far faster and with better understanding through video rather than text or audio alone.

Combining Computershare's global experience in share plans with engaging design and content, we are rolling out video communication services to help your employees engage with your share plans, and to provide your participants with an educated understanding of their awards.

Our plan lifecycle video packs will :

✓ **Help plan participants better understand key concepts**



✓ **Visualise the benefits of your share plans**



## Next Steps

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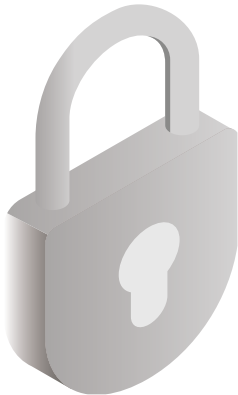
Trustee Services

In Australia and New Zealand there are numerous regulations governing the management of employee incentive plans. With much diversity in plan management requirements and the respective compliance considerations, trustee arrangements have become one of the most common vehicles in facilitating the management of employee equity programs.

Computershare facilitates the provision of a one-stop solution.

Key features

- Facilitate a compliant management solution for different types of plans, including executive awards and broad based employee plans
- Undertake scheme share acquisition and custody
- Manage participant contributions, issuer matching and resulting share purchases
- Liaise with independent auditors to conduct audits
- Prepare trust financial statements and reports



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Trustee Services

Computershare's Australian and New Zealand Trustee Services are integrated with Computershare Plan Managers model.

Establish plan-specific processes and monitor company share obligations in accordance with your plan requirements

Manage corporate events including distribution of dividends and management of voting rights associated with plan shares



Coordinate with plan administrators to manage plan-specific rules including blackout restrictions and vesting conditions

Purchase or Issuance management aligned to a company's hedging strategy

Facilitate the vested shares release process, from delivery of shares, to real-time trading for plan participants

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## Single Sign On (SSO)

You can access EquatePlus transparently through your network’s own authentication process.

There are many advantages to Single Sign On, including.

- Simplifies username and password management
- Reduces password fatigue
- Improves identity protections
- Mitigates security risks

## Next Steps

If you are interested in this service, please contact your Relationship Manager for more information.



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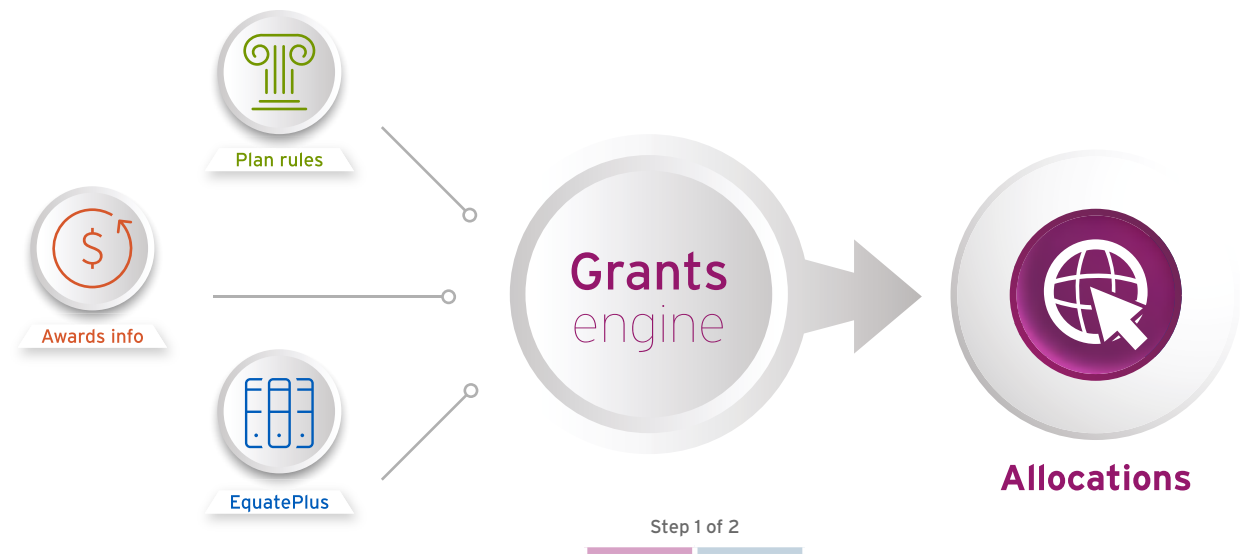
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Automated Grant Update

Our Automated Grant Delivery Tool enables you to deliver new awards to participants with greater ease and certainty. It significantly cuts your workload and removes the complexity of new awards with the security of a fully auditable process.

This powerful awards engine comes with a fully supported set-up service from a dedicated team of experts. It is designed specifically for complex multi-jurisdictional plans with extensive levels, rules and exceptions.



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Automated Grant Update Features

Faster	Smarter	Safer
<ul style="list-style-type: none"><li>› Eliminate manual effort</li><li>› Fast, reliable automated calculations</li><li>› Transfer data directly in and out of the portal</li><li>› Any complexity of rules, jurisdictions and plan types</li><li>› Manage exceptions with ease</li></ul>	<ul style="list-style-type: none"><li>› Free your administrators to focus on process oversight</li><li>› Flexible modelling and forecasting</li><li>› Reporting at any level of detail</li><li>› Collaborate across borders with data at a single point</li><li>› Award segmentation for accounting and reporting</li></ul>	<ul style="list-style-type: none"><li>› Fully supported set-up</li><li>› All your plan rules documented and tested</li><li>› Built-in validation and quality control</li><li>› Reduced errors and risk from manual processes</li><li>› Full audit trails and history</li></ul>

Next Steps

If you are interested in this service, please contact your Relationship Manager for more information.

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## TaxConnect

Introducing TaxConnect our new intelligent solution on EquatePlus which enables the effective and timely calculation of tax associated with globally mobile employees who participate in employee equity plans.

**Intelligent technology** - Computershare’s intelligent technology uses logic to determine which participants need to be routed to the tax advisor and which can go through the standard calculation. Computershare do not do the calculation, that’s for your tax advisors.

**Connects to leading global tax advisors** - Currently linking with Deloitte and EY, TaxConnect can connect to any tax advisor subject to their agreement.

**Straightforward implementation** - The onboarding process for any tax provider is through a standardised API plugin which requires minimal input from you.

**Peace of mind** - TaxConnect is maintained and managed by Computershare on an ongoing basis meaning peace of mind for you. We work with your tax advisor to maintain TaxConnect, monitoring the API to ensure that the systems are live and operational, delivering participant tax calculations in a timely, accurate manner.

**Flexibility** - Offering you the choice and ability to adapt as your business needs evolve. It is easy to add or remove additional features provided by your tax advisors.

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**Benefits**



Delivers fast and reliable real-time estimates on participants tax liabilities.



Keep all participant award information in one place. Access historic transactions with tax details, tax statement, transaction overview, grant information on the Participant Portal.



Offers consolidated reporting covering all participant transactions from your preferred tax provider via EquatePlus payroll reporting.



Tax distribution to respective payrolls in each country (multiple payrolls can be supported for each individual transaction).



Cut your workload with accurate tax calculation for bulk processes such as vestings.



Helps participants make more informed decisions about their employee equity plan.

**Next Steps**

If you are interest in this service please contact your Relationship Manager for more information.

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## Financial Reporting

Computershare’s unique Financial Reporting solution delivers timely and compliant financial reports in accordance with global accounting standards, including International Financial Reporting Standard No.2 (IFRS2).

Managed locally by in-house experts, our streamlined reporting solution helps to reduce your compliance pressures, maximising time and cost efficiencies while retaining the highest quality standards.



Your finance and accounting teams can easily access reports to ensure a streamlined and efficient process for share-based payment accounting and reporting.

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How We Can Help You?



Experienced team with in-depth knowledge of IFRS2 accounting standards and years of practical experience



Automated system and reporting support to manage and track all the related details required



Dedicated to meeting your specific requirements to ensure the reported figures are reflected correctly

Reporting Modules

- Share Based Expense Reporting
  - Forfeiture Rate Analysis Report
  - Disclosure Summary Report
  - Expense Details
- Master Period Report
  - Participant Group History Report
  - Dilutive Earnings Per Share Reporting

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# PeerTracker for Performance Plans

Computershare has partnered with AON to provide PeerTracker, a sophisticated tool to help you calculate and track any reported plan performance metric.

Company performance data from PeerTracker is transmitted to EquatePlus where participants can then see the impact of their company's current performance on the value of their portfolio at any time.

Calculation of performance is based on the metrics set out in your plan rules.

# Next Steps

If you are interested in this service, please contact your Relationship Manager for more information.



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Fund Incentive Plan

Our Fund Incentive Plan solution helps you effectively manage your fund-linked compensation plans, taking advantage of proven technology, saving you time and simplifying your plan management. Your participants benefit too, from a clear overview making it easier for them to understand and engage with their compensation.

Here’s how we help

We provide a range of solutions to manage your Fund Incentive Plan, depending on your needs. We keep the records of the plan for you and your participants, and we can work with you to look at solutions that support you to hedge the granted positions with your preferred trustee.

Need help delivering your plan goals?

If you don’t operate a plan today or you are looking to switch providers, we’re here to help.

With over 35 years’ expertise in managing compensation plans on a global scale, our team of expert people can help you unlock all the benefits of an effective employee incentive plan, without losing focus on your day job.

Our knowledgeable, trusted experts are on hand to support you and share their equity industry best practices.



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Benefits



Drive alignment and engagement

By providing greater visibility of your Fund Incentive Plan, you can help participants to better understand the link between effective fund management and their compensation.



Streamlined plan management

One supplier, platform and data source to simplify administration and save you time.



Flexible solutions

We provide a range of solutions to manage your Fund Incentive Plan, depending on your needs.



Proven technology

EquatePlus is our market-leading platform which enables you to manage the full range of equity, cash and fund-linked compensation plans with one provider.



Simple to stay compliant

Our Fund Incentive Plan solution aligns your employees' compensation with the performance of the funds they are managing.



Effortless for participants

Provide your participants with the ability to manage multiple plans all in one place. Accessibility via web or mobile app gives them the convenience they expect.

Next Steps

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## China Share Plans Solutions

Benefiting from our dedicated China-based team (125 plus team) and our unmatched 15+ years of knowledge and insight in the local market, our China Share Plan Solutions is a unique service that helps multinational clients offer and boost engagement with employee share plans with China based employees, compliantly, efficiently and effectively.

**Experience** - Our dedicated team in China has over 15 years of experience using best practice to develop bespoke solutions for clients looking to provide employee share plans to China based employees.

**Partnership** - We work in partnership at every stage throughout the process: From a discovery workshop to understand requirements through regulatory approvals to launch and on-going management and reporting.

**Expertise** - Our local experts understand how to navigate the complex regulatory framework and how it relates to employee share plans so that a new employee share plan can be up and running within 4 months.

**Employee engagement** - With our local knowledge and global footprint, we know how to engage with employees educating them on the benefits of an employee share plan to maximise participation rates.

## Next Steps

If you are interested in this service please contact your Relationship Manager for more information.

# **World leaders in share plan management**

40 years global & local expertise | proven service methodology  
superior shareholder experience | world leading technology