



BRITISH ISLES SHARE SCHEMES SYMPOSIUM LONDON 2019

British Isles symposium 2019

Thursday March 7

Venue: Travers Smith, 10 Snow Hill, London EC1A 2AL

The Esop Centre's third **British Isles share schemes symposium** will be hosted by senior legal member **Travers Smith** at its London offices on **Thursday March 7 2019**.

The full-day event will include a dozen talks and debates on employee equity plans in both UK based public quoted companies and in SMEs. The event will include a buffet lunch and conclude with an informal drinks reception.

Speaker commitments have been received from Centre members **Bird & Bird; David Craddock Consultancy Services; Deloitte; Pett Franklin; PwC;** the **RM2 Partnership; White & Case;** and from sponsor **Travers Smith**. Centre chairman **Malcolm Hurlston CBE** will give the opening address.

We hope you will take this opportunity to **make a 30 minute topic presentation at the symposium**, a highlight of the Centre's calendar for next year. Your presentation could cover technical issues which have confronted your company while operating either an all-employee share/option plan or a major executive equity plan, or it could be an issuer + adviser case study of the plan(s) your company has recently put in – as an example of whether or not corporate objectives have been achieved by your share plan experience to date.

Speaker fees are modest: member practitioners (service providers) pay **£240** + VAT for each speaker, while plan issuers speak free of charge. The topics covered in the reserved speaker slots so far are:

- ◆ *Going Global - expanding your share plan offshore.* **Travers Smith**
- ◆ *A case study of a tech company that used EMI share options creatively at the same time as attracting external investment.* **RM2 Partnership**
- ◆ *Hybrid EOTs: the new way to structure MBOs & employee ownership.* **Pett Franklin**
- ◆ *Employee share plans in volatile markets.* **David Craddock**
- ◆ *Managing Expectations—the EMI risk and reward rollercoaster.* **PwC**
- ◆ *Alternatives to EMI.* **Bird & Bird**
- ◆ *Impacts of Brexit on employee share schemes.* **White & Case**
- ◆ *Discretion and judgement in executive share plans: issues arising from the 2018 UK Corporate Governance Code.* **Deloitte**

You can adapt one of suggested topics on the following pages to better suit your own speaker objectives, or suggest an entirely different theme. Contact us with your **speaker bids now** to avoid disappointment. Email Fred Hackworth at fhackworth@esopcentre.com or call the team on +44 (0)207 239 4971.

Topic suggestions:

Regulatory & compliance issues

- ◆ GDPR and Mifid II - How are they affecting the operation of all-employee equity plans? Is data monitoring out of control?
- ◆ What must equity plan sponsors and their advisers now do to keep themselves compliant? How demanding is their reporting burden?

Employee Equity Plan Administration

- ◆ In-house or contracted out?
- ◆ The latest equity plan software developments
- ◆ Keeping plan participants onside Cultural and linguistic issues
- ◆ Interactive share plan communications – what works best?

Global share plans: Benchmarking and recent developments

- ◆ What are the latest global employee equity plan surveys telling us?
- ◆ Managing cross-border tax liability for incentivised mobile management
- ◆ How to make global equity plans cost effective while delivering value

Panel session

- ◆ Should the Company Share Option Plan (CSOP) be used more often?
- ◆ The future of all-employee share/stock ownership plans
- ◆ Employee share ownership and 'pension' planning
- ◆ Financial education and employee share ownership

Employee equity plan case histories in both large and SME UK companies

- ◆ What were the main plan objectives? - Are they being realised and how satisfactory are employee plan participation levels?

Employee equity trustee issues

- ◆ Employee Benefit Trusts – uses and abuses – the Roadchef scandal
- ◆ Fiduciary risk for executive plan trustees
- ◆ Tarrred with the same brush? – Regulated Dependencies and offshore tax issues

Executive equity reward packages

- ◆ Will corporate governance reform require new executive plan design parameters?
- ◆ Performance share incentive plans – what should be the criteria for vesting?
- ◆ Shareholder activism - Democratic rights for employee shareholders?

Open debate

- ◆ Is an HMRC approved share scheme always the best solution?
- ◆ Are the minimum holding periods in approved schemes too long?
- ◆ Are share schemes worth the effort/expense of setting up and operating?

SME FOCUS

Self-service employee share ownership in private companies?

- ◆ What's on offer in the Eso supermarket and what fits best?
- ◆ Tax advantages for employers installing HMRC approved all-employee equity plans
- ◆ Should SMEs install one all-employee scheme, or more?
- ◆ The challenges of automating the share plan process.

Why is the financing of UK Esop transactions often difficult?

- ◆ What financing structures are available in the UK for privately-held companies who wish to install Eso?
- ◆ What could or should the government do to help improve the availability of financial support?
- ◆ Preserving jobs in the community
- ◆ Diversification of employee shareholder portfolios – The UK to copy France?