



T.RowePrice

T. Rowe Price Equity Compensation Plans

Complete Administrative Services. Integrated Solutions. Exceptional Value.

Our share plan administration offer combines the quality of service you expect from T. Rowe Price with the experience of J.P. Morgan Workplace Solutions to provide an integrated solution for your organization.

Workplace Solutions at a Glance

Workplace Solutions provides share plan administrative services for equity compensation plans, including employee stock purchase plans and long-term incentive plans.

- Provider of share plan administrative services (technology and operations) since 2005
- Support for U.S. domestic and international companies (public and private)

Flexible Platform

The employer portal caters to every plan complexity and award type imaginable, with key features such as complex estimated tax calculations, vesting and restriction capabilities, a highly flexible communication center, provision of share price and exchange rate feeds, multiformat importing and exporting, and much more. The portal is designed to be “parameter driven,” providing turn-on and turn-off functions to support specific plan requirements.

Equity plan types include:

- Qualified and nonqualified employee stock purchase plans
- Long-term incentive plans, including:
 - Stock options
 - Cash-restricted stock units
 - Performance stock awards or units
 - Restricted stock awards or units
 - Dividend-equivalent units

Employee Portal

The Web-based employee portal gives users online access to their equity and share plan information. It offers a self-directed experience that can be configured based on user preferences, ensuring a personalized solution for participants.

Participants are able to:

- Enroll online for contributory plans and set their contributions levels
- Accept equity awards using Online Grant Acceptance tasks
- Review equity awards
- Access modeling calculators
- View historical share price information
- Transact in the shares from the plans in which they participate*

- View a dynamic Document Library that contains resources such as:
 - Award notices
 - FAQs
 - Videos
 - How-to guides
- Put in a request for help

Client Services

Dedicated client relationship manager and equity plan management team

- Suite of standard reporting and dashboards
- Customizable reporting and dashboards through business intelligence and analytics tools
- Access to Workplace Solutions' marketing team to support education campaigns for participants

Financial Reporting

Workplace Solutions' financial reporting offers a consolidated equity system that covers all aspects of a client's financial reporting requirements and provides real-time updates for valuation, expense accrual, and other financial reports. In addition, the employer portal provides the following functions to satisfy financial reporting requirements:

- Fair value valuation
- Measurement and attribution of expense
- Treatment of forfeitures
- Accounting for tax effects
- Group recharge
- Earnings per share
- Disclosures

Executive Services*

The Workplace Solutions Executive Services team is designed to offer two important benefits: helping publicly listed corporations navigate the complicated regulatory environment and providing white-glove concierge services to executives. With this offer, your company's executives understand their total compensation package and can access creative liquidation strategies.

The full suite of services includes:

- Management and execution of control and restricted shares
- Construction and implementation of prearranged trading plans (for Rule 10b5-1)
- Form 144 filing on behalf of Section 16 Insiders

Let's work together.

Call **1-800-638-7890**. Or visit **troweprice.com**.

*Services provided through Global Shares Financial Services, Inc., Member FINRA/SIPC.

These services are only available to clients with retirement plans recordkept by T. Rowe Price Retirement Plan Services.

T. Rowe Price Retirement Plan Services, Inc., its affiliates, its associates, and J.P. Morgan Workplace Solutions do not provide legal or tax advice.

T. Rowe Price and its affiliates are not affiliated with J.P. Morgan Workplace Solutions or its affiliates.

Brokerage services provided by Global Shares Financial Services Inc., a member of the Global Shares Group, member FINRA/SIPC.

T. Rowe Price Retirement Plan Services, Inc.