

With 11 sessions on topics ranging from TARP restrictions to international issues and equity plans in a down economy, you can't afford to miss the 2009 All-Day Conference! The Conference will provide you with the critical information you need to know to keep your equity compensation expertise up-to-date.

Register Today at www.svcnaspp.com!

Conference Fees:

Pre-registration: **Registration and Payment Received by June 5th, 2009**

NASPP Members \$205

Non-Members \$230

Registration **after** June 5th: \$360

The fee covers conference materials, session attendance, a continental breakfast, lunch, and a cocktail reception.

Program Schedule:

7:30 8:00 Registration & Continental Breakfast

8:00 8:15 Welcome! Rose Hoffman, President, SVC NASPP

8:15 9:30 General Session:

Are New TARP Restrictions on Executive Compensation Coming to Tech Companies in the Valley?

This session will discuss the new governance issues, shareholder activism around say on pay, 162(m) restrictions, limits on exec comp for companies that participate in the bail out to identify what may permeate to other industries. It will also cover trends we see in Europe and other global markets around executive compensation and governance. Levels I, II, III.

Speakers:

Scott Olsen, PricewaterhouseCoopers LLP

Julie Rumberger, PricewaterhouseCoopers LLP

9:45 11:00 Workshop I:

Workshop IA: What is Equity Really Worth? A Wealth Accumulation Approach

This session will argue that survey data and compensation models that continue to rely on accounting-based values are taking compensation analysis in the wrong direction and understating pay, resulting in present and future "holy cow" moments – not just for executives but for the aggregate value transfer to all employees. While there are many proposed approaches to Wealth Accumulation Analysis as a solution to this they often include speculative future compensation over lengthy time periods resulting in a highly theoretical analysis.

Compensation Committees faced with the immediate issue - compensation decisions this year - continue to struggle with some fundamental issues that affect how the analysis comes out. Once the numbers are calculated for the company, and for its peer companies, a number of issues remain. How much is too much? Is there a maximum number that indicates when someone is "done"? Can current pay programs that are not "broken" be tailored to better support shareholder alignment without imposing arbitrary limits on pay? This presentation addresses four key sets of issues that will allow practitioners to develop meaningful Wealth Accumulation Analyses without the mystery of a "black box" or unnecessary forecasting that may be uncomfortable for Compensation Committees. Levels II, III.

Speakers:

Fred Whittlesey, Buck Consultants

Chris Young, Buck Consultants

Workshop IB: Refining Restricted Stock Units: Tackling the Trickier Traps

By now many of us have a handle on the basics of RSUs, their structure and tax implications. So how do we cope with the more unusual issues? What happens if the RSU is fully vested at grant, but isn't accepted (and therefore released/delivered) until weeks later? Which date is used to calculate the taxes? What happens if the vest date is during a leave of absence so the shares aren't released until sometime later? This session will dive into some of the stickier, messier issues of RSUs and the unintended consequences of some plan designs. It will also provide suggestions for ways to avoid these issues, either via design or administration stopgaps. Levels II, III.

Speakers:

Alison Wright Dew, Howard Rice
Mike Hom, Stock & Option Solutions
Carrie Kovac, Symantec Corporation

Workshop IC: Insider Trading: A Case Study of What to and What Not to Do for 10b5-1 Plans

Recently, 10b5-1 plans have come under heightened scrutiny. In late 2006, an academic study suggested that sales under the 10b5-1 plans examined appeared to be generally outperforming the market. In 2007, Linda Thomsen, the SEC's Director of Enforcement, indicated that the SEC was taking a close look at potential abuses by individuals in connection with 10b5-1 plans. With the increased focus on insider trading and the heightened scrutiny surrounding 10b5-1 plans, it is important to adhere to sound practices in connection with the adoption and use of 10b5-1 plans if the benefits of the affirmative defense are to be preserved. Failure to satisfy the requirements of Rule 10b5-1(c) can lead to disastrous consequences, including potential loss of the affirmative defense and exposure to civil and criminal penalties for insider trading. This session will provide best practices for 10b5-1 plans and review case studies of companies that failed to comply with these practices. Levels I, II, III.

Speakers

Janan Raissi, Shartsis Friese LLP
Bill Radtke, UBS Financial Services

11:30 12:45 Workshop II:

Workshop IIA: Navigating the SAFE Approval Process for Employee Equity Programs in China

This presentation will educate participants regarding the SAFE approval process in China for offering employee equity incentive programs to employees in China. It will address the legal, the company's and the broker's perspectives. The presenters will walk attendees through the SAFE approval process including the flow of funds/conversion issues and information on the all-important decision of where to file and also cover a list of issues that should be considered before filing. Levels I, II, III.

Speakers

Jennifer George, Baker & McKenzie LLP
Zackary Crumpton, E*TRADE Corporate Services
Kelly Geerts, Apple, Inc.

Workshop IIB: Cash or Compliance – Let's Make A Deal: Choosing Between Cash and Equity in Challenging Countries

With the global economic downturn, multinational companies are increasingly evaluating whether to provide cash in problem countries in lieu of costly compliance. This session will provide a practical discussion of compliance issues with seasoned issuing companies sharing their experiences and best practices. Levels I, II.

Speakers

Suzie Bentley, NVIDIA Corporation
Jon Doyle, International Law Partners LLP
Wendy Jennings, Riverbed Technology Inc.
Douglas Patterson, Intel Corporation

Workshop IIC: Everything Excel

Stock plan professionals rely on spreadsheets in their jobs on a regular basis to perform routine and complex functions. In this boot-camp type session, industry experts will reveal how to work smarter, faster, and more efficiently to maximize Excel's potential. Panelists will also highlight ways to get your spreadsheets "under control" in an internal controls environment. Spreadsheet junkies won't want to miss this session! Levels I, II, III.

Speakers

Robyn Shutak, NASPP
Rachel Murillo, NASPP

12:45 1:45 Lunch

1:45 3:00 General Session:

Market Instability: More than Just Underwater Stock Options

The current economic environment is wreaking havoc on stock plans and the problem is much bigger than just underwater stock options. This panel will examine the many other effects of market instability on stock compensation— including excessive burn rates, share shortfalls, option valuation, international implications, and more—and will suggest practical solutions for addressing these challenges. Levels I, II, III.

Speakers

Barbara Baksa, NASPP
Ed Hauder, Exequity LLP
Terry Adamson, Radford Valuation Services
Valerie Diamond, Baker & McKenzie LLP

3:30 4:45 Workshop III:

Workshop IIIA: Top Ten Concerns for International Equity Plans in a Down Economy

During a down economy when stock prices and budgets are low, companies often cut back on the attention paid to international stock compensation planning and compliance in an effort to save money. This may seem reasonable in most cases as when stock prices are down, few options are being exercised and other awards are providing less value, leading to less potential exposure. However there are some items that require extra attention. This presentation will focus on those items that would be risky to neglect and will help companies focus on their largest exposures in a down economy and minimize the potential for penalties and interest. The materials will also cover those countries which have already indicated they will focus on compliance to retain/increase revenues during this period. Levels I, II, III.

Speakers

Marlene Zobayan, Deloitte Tax LLP
Carol Rutlen, Rutlen Associates LLC

Workshop IIIB: Don't Ask How High, Just Go the Limit! Putting Performance Equity to Work

Performance-based plans are no longer only for the "Top 5" executives. Even before the crash of the market, companies were increasingly turning to performance shares and units, premium-priced options and other pay-for-performance models to help drive corporate performance and justify better than average compensation. The market downturn has added a new push for these types of programs and equity compensation professionals will be asked to do more than ever before. This presentation will focus on how equity compensation professionals can best manage the plans that are given to them, regardless of the features. Presenters will discuss effective manual and automated processes that will allow performance-based programs to hit their mark. Attendees will leave with a clear set of action steps and tips that will cover design, implementation, communication, management and administration and working within the limitations of software and outsourcing services. Levels I, II, III.

Speakers

Dan Walter, Performensation Consulting
Karen Needham, Independent Stock Plan Advisors, LLC
Peter Djokovich, Strategix Performance, Inc.

Workshop IIIC: US and Global Securities Compliance for 2009

Given today's complex and fast-changing regulatory environment, employers must focus an increasing amount of attention on compliance with regulatory requirements, including securities laws. This session will focus on the country-specific securities law challenges that a multinational company faces when designing and offering compensation programs to a global workforce. Levels II, III.

Speakers

Craig Tanner, Reed Smith LLP
David Mittelman, Reed Smith LLP

4:45 7:00 Networking Cocktail Reception

Conference Attire:

Please dress comfortably! Conference rooms can be chilly & temperatures may vary between rooms.

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

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Speaker Biographies

Terry Adamson, CEP, National Practice Leader, Radford Valuation Services

Terry serves as the National Practice Leader for Radford Valuation Services, the equity valuation group of Aon Consulting. In that role, Terry leads the FAS 123(R) practices and advises over 250 public companies with regard to equity design, valuation, and accounting. Terry was on the FASB Round Table on Employee Share Options, and is the Chairperson of the Society of Actuaries taskforce on stock option valuation.

www.radford.com

Barbara Baksa, CEP, Executive Director, National Association of Stock Plan Professionals

Barbara has fifteen years experience in equity compensation and 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 sixth edition of "Accounting for Equity Compensation," published in 2009 by the NCEO. Barbara also serves as editor of *The NASPP Advisor* and contributing editor of *The Corporate Executive*. Barbara has a BA in English from the University of Iowa and is a Certified Equity Professional.

www.naspp.com

Suzie Bentley, CPP, Director of Payroll, Stock Administration and 401(k), NVIDIA Corporation

Suzie is the Director of Payroll, Stock Administration and 401(k) at NVIDIA Corporation in Santa Clara, CA. She has worked in Finance for over twenty years in the Silicon Valley high-tech Industry. Her experience includes working through domestic and global workforce mobility issues and its effects on employees' payroll and equity compensation. Suzie is a volunteer for the American Payroll Association, a member of the NASPP, and a member of the California Payroll Conference. She is instrumental in developing and delivering educational materials internally for NVIDIA and externally for her volunteer affiliations.

Zackary Crumpton, CEP, Senior Manager, Client Management, E*TRADE Corporate Services

Zackary has over 20 years of experience in the financial service industry where he held various roles with increasing responsibilities. Zackary is a Senior Manager of Client Management for E*TRADE Corporate Services. In his current role he executes B2B tactical plans in-line with strategic directions, service models, client retention and sales strategy to grow the business. In addition, he collaborates with legal, accounting, compensation benefits and consulting firms in the stock plan industry to develop successful and solid business relationships to better service mutual clients.

business.etrade.com

Alison Wright Dew, CEP, Special Counsel, Howard Rice Nemerovski Canady Falk & Rabkin

Alison Wright is special counsel at Howard Rice Nemerovski Canady Falk & Rabkin. Alison's practice focuses on the tax, securities and ERISA aspects of executive and equity compensation, including deferred compensation plans, stock plans, change in control plans and executive employment and severance agreements. She advises clients regarding traditional employee benefit plans, including 401(k) and other retirement plans and health and welfare plans. Alison has experience assisting clients with compensation and benefits issues raised in mergers and acquisitions, including golden parachute payments and COBRA responsibilities.

www.howardrice.com

Valerie H. Diamond, Partner, Baker & McKenzie LLP

Valerie is Chair of the Global Equity Services Group at Baker & McKenzie's San Francisco office. Her practice focuses on international equity compensation plans, executive compensation and employee benefits. She provides advice to clients on all aspects of tax and legal compliance when options, restricted stock or purchase rights are granted to employees both within and outside the United States. She is the 2008 recipient of the National Association of Stock Plan Professionals' Individual Achievement Award, and is the Chair of the Board of Review for the Certified Equity Professional Institute.

www.bakernet.com/ges

Peter Djokovich, President, Strategix Performance, Inc.

Peter founded Strategix Performance in 1983. With more than 25 years in the field of performance-based compensation plans, Peter is one of the world's foremost experts on performance compensation plans. Peter has designed and implemented more than 3,000 management and broad-based performance-based plans at more than 400 companies. He is a regular speaker at industry events all over the United States. Peter believes that his companies' greatest achievements, and the sole measure of their success, are the extraordinary successes experienced by their clients, as validated by them and independent assessments. These include unprecedented sales and revenue growth; dramatic improvements in customer service, loyalty and relationship profitability; beyond expectation quality, service support, and productivity advances; and exceptional improvements in employee loyalty, morale, achievement, and retention.

www.strategixperformance.com

Jon F. Doyle, Partner, International Law Partners LLP

Jon is a Partner International Law Partners LLP. Jon's practice focuses on international corporate, tax and securities matters. He advises multinational companies and financial institutions on legal issues related to doing business overseas - including outsourcing and offshoring arrangements, joint ventures and other means of international expansion. Jon works with clients in designing, offering, and implementing international equity-based compensation programs. He has particular experience advising businesses regarding the tax, securities, foreign exchange, labor, data privacy and ecommerce issues encountered globally with offers of equity awards to employees, directors and consultants.

www.ilawpartners.com

Kelly Geerts, Finance Manager, Apple, Inc.

Kelly manages Apple's global stock plan operations team, including daily interaction with brokers and Apple's transfer agent, equity expensing and accounting, and Section 16 reporting. She is also responsible for Apple's Americas payroll tax and accounting teams. Apple's current equity programs include broad-based NQ options, restricted stock units and a 423 employee stock purchase plan, covering 30,000 employees in 35 countries.

Jennifer George, Partner, Baker & McKenzie LLP

Jennifer is a partner at Baker & McKenzie in the global equity services group in the San Francisco office. Since January 2001, Jennifer has been assisting companies implement employee equity incentive plans and other benefit programs on a global basis. Her work on the implementation of employee incentive plans involves tax, securities laws, exchange control regulations, labor laws and related issues.

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Edward A. Hauder, Senior Attorney, Exequity LLP

Ed is a Senior Attorney and Consultant of Exequity LLP. Ed focuses on keeping public companies out of the penalty box with shareholders and the media and helps companies consider technical matters impacting compensation, e.g., financial accounting, securities, tax, and corporate governance issues. His expertise includes RiskMetrics Group (formerly ISS) compensation modeling and policies, which enabled him to create the Flexible Share Authorization to maximize equity plan flexibility.

www.exqty.com

Mike Hom, Manager, People Solutions Support, Stock & Option Solutions, Inc.

Mike has been in the equity compensation business for over 8 years. As manager of People Support, he helps SOS consultants out in the field. His expertise is around solving complex equity compensation issues such as M&A, expensing, stock splits, FAS123r implementation, rolling out new equity compensation tools, etc. His consulting clients include many of the top Silicon Valley companies. Mike has also been an involved member on both the SVC NASPP Chapter Executive and Program Committees.

www.sos-team.com

Wendy Jennings, CEP, Director, Employee Shareholder Services, Riverbed Technology Inc.

Wendy has over 20 years of equity compensation plan experience. Wendy's experience includes responsibility for all equity plans, analysis, design and implementation, Section 16, insider trading compliance, proxy preparation, FAS 123 valuation, mergers & acquisitions, and restricted stock programs. Wendy received her CEP designation in 1993. Wendy serves on the CEP Advisory Board and the CEP Curriculum Committee. Wendy serves on the GEO Advisory Council and is Co-Chair of the GEO San Francisco chapter. Wendy is a Director of the NASPP San Francisco chapter and received the NASPP Individual Achievement Award in 2005.

Carrie Kovac, CEP, Senior Manager of Equity Compensation, Symantec Corporation

Carrie brings over 14 years of experience to Symantec Corporation. She is responsible for all company operations related to Equity including FAS123R, Sarbanes Oxley, Global Stock Programs, Annual Proxy Statement and SEC Reporting. Prior to moving to Symantec, Carrie was the Director of Investor Relations for Aspect Communications. Carrie holds a Bachelor of Science in Commerce in Accounting from Santa Clara University, is a Certified Public Accountant and a Certified Equity Professional. She is a member of the E*TRADE Advisory Board, GEO, NASPP and AICPA.

David Mittelman, Counsel, Reed Smith LLP

David is counsel with the San Francisco office of Reed Smith LLP. David's practice involves counseling public companies and related persons on the interpretation and application of disclosure and compliance issues under the federal securities laws including the Sarbanes-Oxley Act. He regularly advises corporations, directors, officers, and investors on securities transactions, corporate governance matters, and SEC interaction. David is a deputy leader of Reed Smith's Securities and Capital Markets team. In 2009, David was named a BTI Client Service All-Star for delivering superior client service based upon a survey by BTI Consulting of corporate counsel at Fortune 1000 organizations.

www.reedsmith.com

Rachel Murillo, CEP, Editorial Director, National Association of Stock Plan Professionals

Rachel is the Editorial Director at the NASPP. Her responsibilities include updating and creating new portals for the NASPP website, monitoring and participating in NASPP Discussion Forums, and creating the Compliance O'Meter monthly quiz. Rachel has been administering stock plans since 2003. She was previously the senior Stock Plan Administrator at Amazon.com where she headed up the international taxation and administrative functions. She also previously worked in the stock plans outsourcing group at E*TRADE FINANCIAL where she administered a wide variety of equity plans for a number of diverse companies. Prior to E*TRADE, Rachel had administered stock plans for a venture capital group in the Silicon Valley, managing the full capitalization in an Excel spreadsheet. Rachel graduated from the University of Oregon with a B.A. in Chinese Studies and became a Certified Equity Professional in 2005.

www.naspp.com

Karen Needham, CEP, Managing Director, Independent Stock Plan Advisors, LLC

Karen has over 25 years of experience in stock plan services both as an administrator and subject matter expert, providing training and education on administration, participant issues, policies and procedures. Independent Stock Plan Advisors specializes in equity compensation consulting including vendor selection, best practice and database audits, administration support, employee education and training. Karen previously served as the Director of Client Training and Education for Corporate Employee Financial Services at UBS Financial. Prior to joining UBS, Karen spent six years at E*TRADE Corporate Services as Senior Manager, Training, Consulting and Industry Education. Karen began her career at Wang Laboratories in 1978 as administrator and was a Senior Shareholder Services manager for Genzyme Corporation. Karen serves on the Board of Directors for the NCEO, and is chair of the equity committee for the NCEO. She serves on various committees for the CEP Institute.

www.ispadvisors.com

Scott Olsen, Principal, PricewaterhouseCoopers LLP

Scott is a Principal in PricewaterhouseCoopers' Human Resource Services Practice in the New York office, and serves as the leader of both the firm's US Reward practice and its global Compensation practice network. Scott has over 20 years of experience in executive compensation and benefits. He specializes in executive compensation governance, total compensation strategy, and incentive design, including both equity incentives and incentives based on operating performance. He has worked with companies in a variety of industries, in the United States as well as in Europe, Asia, and Latin America and is a frequent speaker on the subject of executive compensation and corporate governance. Scott joined PricewaterhouseCoopers from Towers Perrin where he was the co-leader of that firm's global Executive Compensation practice. He has also served as Senior Vice President of Stern Stewart & Co., and in positions with Mobil Corporation and KPMG.

<http://www.pwcequityplanner.com/>

Douglas Patterson, CPA, MBA, Global Stock Compliance Analyst, Intel Corporation

Douglas manages international and US domestic equity compliance and project manages change implementation for Intel's ESPP, RSU, and option plans across 48 countries. He has been with Intel Corp for 14 years, including 4 years in his current role, and has Intel experience in international relocation, expatriate taxation, and tax accounting. He was formerly with Pricewaterhouse.

Bill Radtke, CEP, Vice President, UBS Financial Services

Bill is a UBS financial advisor based in the San Francisco office. He advises corporate clients on their equity compensation plans while also providing individual UBS investors with advisory services regarding equity compensation in conjunction with their overall financial planning needs. He began his career in the Stock Administration Industry in 1998 at a large brokerage firm focused on Stock Plan Services. He then consulted for corporate clients throughout the Silicon Valley from 2000 to 2002, advising on their employee stock benefit plan administration. He also serves on the Program Committee of the NASPP Silicon Valley Chapter. Bill holds licenses for multiple financial instruments, and maintains securities registrations in all 50 states. Bill also holds the designations of Corporate Stock Benefit Consultant and Corporate Services Financial Advisor within UBS Financial Services Inc.

www.ubs.com

Jahan P. Raiss, Partner, Shartsis Friese LLP

Jahan is a partner of the firm and co-chair of the firm's Securities Enforcement Defense Group. Before joining the firm, Jahan was a Senior Counsel in the Division of Enforcement of the Securities and Exchange Commission in Washington, D.C. While at the SEC, he handled investigations and litigation in both federal court and administrative forums, including cases involving accounting irregularities, auditor misconduct, internal corporate controls, public company disclosures and periodic reports, insider trading, securities offerings, market manipulation, and broker-dealer and investment adviser regulation. Jahan coordinated matters with federal and state criminal prosecutors, foreign regulatory agencies, and self-regulatory organizations such as FINRA (formerly NASD).

www.sflaw.com

Julie Rumberger, Managing Director, PricewaterhouseCoopers LLP

Julie is a Managing Director of the HR Services consulting practice of PricewaterhouseCoopers LLP (PwC), advising public and private companies on executive compensation matters whether dealing with domestic or global issues. Julie is a Canadian lawyer, also a member of the American Bar Association, and has been licensed in California since 2004. Julie advises on U.S and international technical tax issues as well as applicable international exchange control, labor law and securities law issues related to incentive plan implementation. Julie has previously occupied various positions at PwC, Baker & McKenzie and Apple Inc. Julie returned to PwC in 2008 to continue applying her specialty knowledge in the area of equity compensation.

<http://www.pwcequityplanner.com/>

Carol Rutlen, CPA, Managing Partner, Rutlen Associates

Carol is the managing partner of Rutlen Associates LLC. Carol brings her clients over 25 years of experience with extensive concentration in tax and human resource issues associated with international tax, human resource, and global stock plans. Carol specializes in global stock plan issues such as mobile employees, process improvement, and risk management. Previously Carol was a partner with PricewaterhouseCoopers and was the partner-in-charge of their global stock practice and the International Assignment Services practice in northern California. Carol also founded and served as CEO of ExpatEdge®, a software company focusing on the unique needs of mobile employees. She has served on the Certified Equity Professional Institute (CEPI) Advisory Board since 2000, serving as chair in 2005 – 2006. She serves as project leader for the CEPI Guidance - Procedures - System publication. Carol is also an adjunct professor in the Master of Tax program at San Jose State University.

www.rutlen.com

Robyn Shutak, CEP, Education Director, National Association of Stock Plan Professionals

Robyn is the Education Director for the NASPP. Prior to joining the NASPP, Robyn was the Senior Manager, Equity Compensation for Entropic Communications, Inc. where she was responsible for managing all aspects of the company's 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. Ms. Shutak 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 is a board member of the San Diego Chapter of the NASPP, a member of the curriculum committee of the CEP Institute and the Membership Director of the CEP Institute Society.

www.naspp.com

Craig Tanner, Partner, Reed Smith LLP

Craig is a partner in the San Francisco and Silicon Valley offices of Reed Smith LLP. Craig represents clients, domestically and internationally, in equity compensation, executive compensation, employment, and data privacy. In his compensation practice, Craig works with clients in designing, offering, and implementing international equity-based compensation programs, including stock options, stock purchase rights, restricted stock, restricted stock units, phantom stock, and stock appreciation rights, as well as salary and cash bonus programs. Craig advises clients on the tax, securities, employment, currency exchange, data privacy, and communications issues that companies encounter when offering the programs throughout the world. Craig also advises clients on U.S. and cross-border equity compensation issues arising in mergers and acquisitions.

www.reedsmith.com

Dan Walter, CEP, President & CEO, Performensation Consulting

Dan has more than 14 years of experience with both executive and broad-based equity compensation. He provides end-to-end solutions for private and public companies based in both the United States and abroad. He has worked as a compensation consultant, administrator, software architect and adviser. Performensation's unique solutions include GEMS, a robust tool for tracking, managing and communicating performance-based programs. Dan also assists in correcting out-of-the-money stock option programs and troubled ESPPs, Additional services include RFPs and provider evaluations, and bridging the growing gap between the services of traditional compensation consultants and the professionals at issuing companies.

www.performensation.com

Fred Whittlesey, CEP, Principal, Buck Consultants

Fred is a Principal and leader of the West Region compensation consulting practice for Buck Consultants. He specializes in compensation strategy, executive compensation, and equity-based compensation. Fred is co-founder of the Global Equity Organization (GEO), a Founding Member of the National Association of Stock Plan Professionals (NASPP), past Chair of the Advisory Board for the Certified Equity Professional (CEP) Institute, and a current member of the Executive Compensation Task Force of CompensationStandards.com. His many years of compensation consulting experience include positions with Towers Perrin, Mercer and Aon Consulting/Radford Surveys and he was a founder of Compensation Venture Group, Inc. He has authored dozens of articles and has presented his ideas at compensation conferences around the world. His most recent work is "Measuring the ROI of Compensation Expenditures" in the new edition of The Compensation Handbook.

www.buckconsultants.com

Chris Young, Principal, Buck Consultants

Chris is a Principal and Managing Director of the Compensation Services practice in the New York City office of Buck Consultants which he rejoined in 2007. Chris has focused on executive compensation plan design and appropriateness, but also has considerable experience in the broad-based compensation areas. Chris' Executive Compensation practice focuses on providing a comprehensive view of plan design, reflecting creation of an optimal legal, tax, technical, and accounting footprint, while creating a total remuneration framework aligned with the organization's business imperatives and strategies. Chris also worked at UBS Warburg in the equity risk management area, developing risk management products for the employee benefits structured products area. Chris holds a B.A. degree in Mathematics from Johns Hopkins University and an M.B.A. from University of Chicago, Graduate School of Business, in Finance and Econometrics.

www.buckconsultants.com

Marlene Zobayan, Director, Deloitte Tax LLP

Marlene leads Deloitte Tax's Global Rewards practice on the west coast of the US. She has over fifteen years of international tax and benefits experience including US and UK expatriate tax, compensation and benefits and global equity experience. She provides a full scope of services to her clients including plan design, tax and legal due diligence and minimization, assistance with local approvals and filings, communications, and designing administrative processes. She is a regular speaker and author on global stock plan and rewards issues. Marlene has a Physics degree from Oxford University; she is a member of the U.K. Association of Tax Technicians, a US Enrolled Agent and Certified Equity Professional. She sits on the Advisory Board of the Certified Equity Professional Institute.

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