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October 21-24, 2025

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**Session
Info
Inside**





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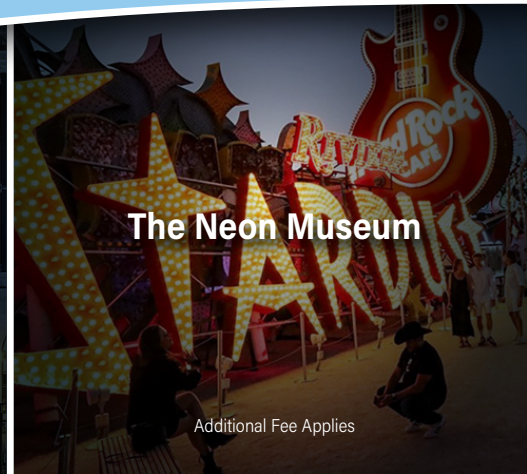
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Schedule Overview



Agenda displayed in Pacific Time. Schedule subject to change.

TUESDAY OCTOBER 21, 2025

- 8:00 AM-4:00 PM **Equity Compensation Bootcamp***
- 8:00 AM-5:00 PM **Proxy Disclosure Conference***
Presented by: TheCorporateCounsel.net & CompensationStandards.com
- 4:00-5:00 PM **First-Time Attendee Happy Hour**
- 5:00-7:00 PM **Opening Reception**

WEDNESDAY OCTOBER 22, 2025

- 8:15-9:15 AM **Opening Keynote: Reaching New Heights**
José Hernández, Astronaut, Entrepreneur, Author
Sponsored by: J.P. Morgan Workplace Solutions
- 9:15-9:30 AM **Session Change**
- 9:30-10:30 AM **Panel Discussions**
- The SEC All-Stars: Executive Pay Nuggets
 - Case Studies: Plan Design, Employee Engagement & Automation
 - Effective Cap Table Management with Limited Resources
 - Position Your ESPP for Global Growth & Local Compliance
 - World Tour: What's New in Global Tax & Legal Compliance
- 10:30-11:15 AM **Break**
- 11:15 AM-12:15 PM **Panel Discussions**
- Double Session: Clawbacks & Compensation Disclosures Fixes
 - 25 Tips for Global Stock Plan Compliance
 - Equity for Everyone: Navigating Change & Diversity
 - Pre-IPO to Public: The Equity Plan Lifecycle
 - Trends in Equity Plan Administration: 2025 Benchmarks
- 12:15-1:45 PM **Lunch**
- 1:45-2:45 PM **Panel Discussions**
- Key Issues in STI and LTI: Structure & Disclosure
 - EDGAR Next: Best Practices & Next Steps
 - Metrics That Matter: Smarter Equity Communications
 - Private Company Equity: Accounting & Valuation Challenges
 - Scaling Global Equity to Attract & Retain Talent

2:45-3:30 PM **Break**

3:30-4:30 PM **Panel Discussions**

- Navigating ISS & Glass Lewis
- Can AI Do It? Participant Education on a Budget
- How to Stay Cool in Global Compliance Hot Spots
- The Weighting Game: Secondary Transactions and Valuation of Equity Awards

THURSDAY OCTOBER 23, 2025

8:30-9:30 AM **Panel Discussions**

- Granting Equity Globally? What to Know Before & After
- How to Optimize Stock Plan Administration with AI
- Preparing for an IPO: Equity Compensation Insights
- What's Hot, What's Next: 2025 Equity Comp Update
- When to Roll the Dice on Stock Plan Compliance

9:30-9:45 AM **Session Change**

9:45-10:15 AM **Power Talks**

- 409A & Global Equity: Compliance Strategies for Mobile Workforces
- Compensation Accountability Tools: Beyond Clawbacks
- ESPPs: Wage Boost or Wealth Accumulation?
- Managing Double-Trigger RSUs & Liquidity Waivers
- Proxy Table Efficiency Hacks

10:15-11:00 AM **Break**

11:00 AM-12:00 PM **Keynote: The Big Questions You Need to Ask About AI and Your Organization**

Nicholas Thompson, CEO of The Atlantic, Tech Journalist, AI Thought Leader
Sponsored by: Bank of America

12:00-12:15 PM **Session Change**

12:15-12:45 PM **Power Talks**

- After the Clawback: Accounting & Tax Implications
- Easy ESPPs: Quick Fixes to Boost Efficiency
- Equity Compensation for a Multigenerational Workforce
- Section 162(m) Under ARPA: Are You Ready for 2027?
- Using NQDC to Retain and Reward Executives

12:45-2:15 PM **Lunch**

Schedule Overview

Agenda displayed in Pacific Time. Schedule subject to change.



THURSDAY OCTOBER 23, 2025 *continued...*

- 2:15-3:15 PM **Panel Discussions**
- Deal-Proof Your Comp Plans: What's Trending in M&A
 - Examining Use Cases—and Risks—of Vesting Acceleration
 - Financial Reporting for Global Equity Plans
 - Reddit's IPO Story: Lessons from Year One as a Public Company
 - Smarter Stock Grants: Data, Approvals & AI
- 3:15-4:00 PM **Break**
- 4:00-5:00 PM **Panel Discussions**
- 10 Common Drivers of Financial Reporting Complexity
 - Across State Lines: Conquering Mobility & Tax Compliance
 - High Stakes, High Rewards: Requesting Shares without Proxy Advisor Support
 - Section 16 & Insider Compliance Today
 - Your Executives Need Education Too
- 6:30-9:00 PM **NASPP After Party**

FRIDAY OCTOBER 24, 2025

- 8:30-9:45 AM **Learning Labs**
- AI Productivity Hacks for Stock Plan Administrators
 - Equity Comp Shark Tank: Pitching Bold New Ideas
 - ESPP Expense Reporting: How to Get It Right
 - Global Taxation: Key Challenges & Strategies
 - Unlocking the Formula for Next-Level Executive Services
- 9:45-10:05 AM **Session Change**
- 10:05-11:20 AM **Learning Labs**
- Aligning Compensation Practices with ISS Governance Standards
 - Global Reporting and Registration: To Disclose or Not to Disclose?
 - Practical AI + Excel Tips for Equity Admins & Accountants
 - Top Global Stock Plan Mistakes & How to Fix Them

EDUCATIONAL LEVELS

Personalize your agenda for your career stage and responsibilities with session options for beginners through advanced:

- F** Foundational
- I** Intermediate
- A** Advanced

AVAILABLE CE CREDIT

CEP: 12 Conference Hours | 7 Bootcamp Hours
CPE: 13 Conference Hours | 8 Bootcamp Hours
CLE: Credit Varies by State

DYNAMIC SESSION FORMATS

Panel Discussions

Get the insights and action items you need as panels of equity comp titans engage in thought-provoking discussions with focus on both the strategic and the technical.

Power Talks

Fast-paced, energetic talks on buzzy, forward-thinking topics that are trending among equity comp pros right now.

Learning Labs

Guided, hands-on learning featuring interactivity and how-to content for more technical and complex topics.



SESSION TRACKS

- Trending Issues
- Artificial Intelligence
- Compensation Strategy
- Compliance & Controls
- ESPPs
- Executive Compensation
- Expense Management and Reporting
- Global Equity
- Participant Engagement
- Plan Design and Features
- Plan Management
- Private Companies
- Professional Development
- Taxation

Most sessions offer continuing education credit. See conference.naspp.com for more information.

UNLOCK MORE LEARNING

Only in Las Vegas

Add-On Opportunities



OCTOBER 21

Equity Compensation Bootcamp*

New to equity comp? Supercharge your skills in one day!



OCTOBER 21

Proxy Disclosure Conference*

Essential guidance, direct from the experts, on how to anticipate critical issues and use the annual reporting season to your advantage.

Free to Attendees



OCTOBER 22

21st Annual Executive Compensation Conference

Strategies and best practices, what compensation committees should be doing now, and much more.

[Learn More](#)

*Optional add-on. Additional fees apply.

OCTOBER 22, 2025

WEDNESDAY HIGHLIGHTS



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Opening Keynote



Wednesday, October 22 | 8:15-9:15 AM (PT)

Reaching New Heights

José Hernández

Astronaut | Entrepreneur | Author

From humble beginnings as a migrant farmworker to achieving his dream of becoming a NASA astronaut, José Hernández is a powerful example of perseverance and purpose. Rejected by NASA 11 times, he was finally selected for their 19th class of astronauts and flew aboard Space Shuttle Discovery to the International Space Station in 2009.

Experience his extraordinary story—now featured in the film “A Million Miles Away”—and get inspired to work hard, set bold goals, and reach new heights.

Sponsored by:

J.P.Morgan

WORKPLACE SOLUTIONS



Wednesday, Oct. 22 | 9:30-10:30 AM (PT)



The SEC All-Stars: Executive Pay Nuggets

Our “SEC All-Stars” have decades of experience with the inner workings of the Commission. In this panel discussion, these former Staffers will share their practical insights on today’s most pressing executive compensation issues—and answer your burning questions.

Executive Compensation Conference Session



Tracks: Compensation Strategy, Executive Compensation

Case Studies: Plan Design, Employee Engagement & Automation

Hear from NASPP Distinguished Equity Fellows as they share real-world case studies on redesigning equity programs, boosting employee engagement, and using automation to improve efficiency. Learn how companies are creating effective participant touchpoints, documenting internal processes, and adapting plan design to reduce attrition and attract talent. Walk away with proven strategies to strengthen your equity programs and drive meaningful results.

Panel Discussion



| Track: Plan Management

Effective Cap Table Management with Limited Resources

In many private companies, cap table management often doesn’t belong to a single function—it’s handled by professionals juggling equity, HR, accounting, payroll, and more. Whether you’re issuing grants, supporting financial reporting, or prepping for a liquidity event, accuracy and efficiency are critical. Learn how to streamline cap table management with limited resources, minimize errors, and use technology to stay compliant and scale your process with confidence.

Panel Discussion



| Track: Plan Management

Position Your ESPP for Global Growth & Local Compliance

ESPPs remain one of the most effective ways to give employees a meaningful stake in their company’s success. But as organizations expand globally, designing plans that align with both corporate objectives and differing local regulations is increasingly complex. Hear from leading third-party administrators and consultants as they share trends in plan design, explore the rise of nonqualified ESPPs, discuss the use of lookbacks, and examine how technology and AI are reshaping ESPP administration.

Panel Discussion



| Tracks: Compensation Strategy, ESPPs

World Tour: What’s New in Global Tax & Legal Compliance

Hear from NASPP Distinguished Equity Fellows as they share real-world case studies on redesigning equity programs, boosting employee engagement, and using automation to improve efficiency. Learn how companies are creating effective participant touchpoints, documenting internal processes, and adapting plan design to reduce attrition and attract talent. Walk away with proven strategies to strengthen your equity programs and drive meaningful results.

Panel Discussion



| Tracks: Public Companies, Private Companies

Educational Levels:



Foundational



Intermediate



Advanced



Wednesday, Oct. 22 | 11:15 AM-12:15 PM (PT)



DOUBLE SESSION

The Year of the Clawback

While mandatory Dodd-Frank clawback policies became a reality in late 2023, we expect the first large wave of mandatory clawbacks in the 2025 proxy season. Learn from the “unlucky”! Our panelists will share lessons from the restatements announced and clawbacks instituted in 2025—plus ongoing considerations for your clawback policy and what you can do to prepare.

Compensation Disclosures You Need to Fix

The compensation disclosure rules — especially the tabular disclosures — are prescriptive and tricky. They require an understanding of executive compensation structures and the applicable disclosure requirements and accounting rules, or close collaboration among a team that collectively understands these topics. It is easy to get tripped up, especially if you face a new and novel (to you) compensation structure. This panel is your “ace in the hole”! Our panelists will discuss common foot faults in executive compensation disclosures and how to avoid them.

Executive Compensation Conference Session



Tracks: Compensation Strategy, Executive Compensation

25 Tips for Global Stock Plan Compliance

Global equity compliance is full of hidden traps, shifting tax rules, and evolving legal requirements. Get 25 practical tips covering 20 key countries to help you stay ahead of regulatory changes, streamline administration, and avoid common missteps. Whether you're expanding into new markets or tightening up existing processes, walk away with actionable insights and go-to resources you can apply immediately.

Panel Discussion



| Tracks: Compliance and Controls, Global Equity

Equity for Everyone: Navigating Change & Diversity

What good is equity if employees don't understand or value it? Learn how to cut through noise, misinformation, and shifting employee demographics to reach participants of all ages, roles, and locations. Through real-world examples, discover scalable ways to expand your communications strategy, leverage plan data and cultural context, and use tech to build trust—without blowing your budget or your bandwidth.

Panel Discussion



| Track: Participant Engagement

Pre-IPO to Public: The Equity Plan Lifecycle

Follow the real-world equity compensation journey of a company that successfully transitioned from private to public. Learn how their approach evolved—from equity planning and administration in the lead-up to IPO to the post-IPO changes driven by increased regulation and reporting and communication requirements. Get practical insight into how the company adapted at each stage and what it means for organizations preparing for a similar path.

Panel Discussion



| Track: Compensation Strategy

Trends in Equity Plan Administration: 2025 Benchmarks

Is your equity plan administration on pace with current best practices? Get valuable benchmarks as we examine results and trends from the 2025 Equity Administration Survey from the NASPP and Deloitte Tax LLP. Topics will include staffing and recordkeeping, use of AI in managing equity plans, tax compliance (including mobile employees), participant education, insider trading policies, and global practices.

Panel Discussion



| Tracks: Plan Management, Trending Topics

Educational Levels:



Foundational



Intermediate



Advanced



Wednesday, Oct. 22 | 1:45-2:45 PM (PT)



Key Issues in STI and LTI: Structure & Disclosure

KEY ISSUES IN STI: In the last few years, we have seen frequently shifting trends in annual incentive plan performance metrics and increasing skepticism of them by investors, who cite evidence that things like individual metrics, E&S metrics and discretionary adjustments are just being used to “sweeten the pot.” Join our panelists as they discuss the latest trends in STI design and performance metrics and share practical tips for structuring and disclosing your annual incentives.

KEY ISSUES IN LTI: Are we on the brink of a major shift in how public companies approach LTI compensation for their executives? Following its 2024 Global Benchmark Policy Survey, ISS noted investor concerns about poorly designed performance-based equity programs. The proxy advisor opted against major shifts to its benchmark policy guidelines for the 2025 proxy season but signaled the potential for greater policy changes for 2026. Any change could have long-term, wide-ranging impacts.

For now, companies are still navigating complex LTI programs and struggling to set rigorous, achievable long-term performance goals in an uncertain environment. Our panel will discuss these potential changes and share tips for managing your equity program.

Executive Compensation Conference Session



Tracks: Compensation Strategy, Executive Compensation

EDGAR Next: Best Practices & Next Steps

EDGAR Next is reshaping how Section 16 filings are managed. Learn how the new platform works, what's changed with Form ID, and user roles on the new platform. Hear best practices for insider access, cross-company coordination, and insider education—plus lessons learned from early adopters. Walk away with key insights and a heads-up on upcoming deadlines to make sure your team isn't caught unprepared.

Panel Discussion



Tracks: Compliance and Controls, Executive Compensation, Trending Topics

Metrics That Matter: Smarter Equity Communications

Are your equity plan communications resonating with the people they're meant to serve? Learn how to use participant behavior and demographic metrics to shape more effective education strategies. Explore how data can help you capture attention, boost engagement, and tailor your outreach to meet the needs of a diverse participant base—so your messages land with real impact.

Panel Discussion



Track: Participant Engagement

Private Company Equity: Accounting & Valuation Challenges

Private companies are increasingly using equity compensation to attract and retain talent, but without a public market to establish stock value, they face complex accounting, valuation, and compliance challenges. From 409A valuations to ASC 718 expense recognition, private companies must carefully navigate financial reporting requirements, tax implications, and evolving regulatory standards to avoid costly penalties and be prepared for a liquidity event.

Panel Discussion



Track: Expense Management and Reporting

Scaling Global Equity to Attract & Retain Talent

As companies expand globally, equity plans must do more than scale—they must engage top talent across diverse markets. Explore key strategies for launching or expanding broad-based equity and ESPPs, with a focus on thoughtful design, regional adaptability, and measurable outcomes. From building a culture of ownership to aligning with business goals and managing cost, learn how to make equity a sustainable driver of engagement, retention, and growth.

Panel Discussion



Tracks: Compensation Strategy, ESPPs, Global Equity

Educational Levels:



Foundational



Intermediate



Advanced



Wednesday, Oct. 22 | 3:30-4:30 PM (PT)



Navigating ISS & Glass Lewis

With many investors using ISS and Glass Lewis recommendations as a factor in voting decisions, this session is critical for anyone advising boards or compensation committees on executive compensation decisions, participating in shareholder and proxy advisor engagement processes, or working on documentation and disclosures.

Prepare for issues that could affect 2026 support for your Say-on-Pay and equity plan resolutions—as well as compensation committee elections—including key policy changes, disclosure dos and don'ts, tips for engaging with proxy advisors and more.

Executive Compensation Conference Session



Tracks: Compensation Strategy, Executive Compensation

Can AI Do It? Participant Education on a Budget

Even in a world of constant communication, participants often struggle to find trusted, accessible information about their equity. Explore how companies like Block, PayPal, and Procore are rethinking participant education—using AI, smart design, and scalable strategies to meet evolving employee needs. Get practical ideas for creating or revamping your own program, no matter your budget or headcount.

Panel Discussion



Tracks: Artificial Intelligence, Participant Engagement, Trending Topics

How to Stay Cool in Global Compliance Hot Spots

Offering equity outside the US means navigating legal and tax hot spots that vary by country. From Australia and China to Japan, Portugal, and the Philippines, learn how to identify compliance challenges before they escalate. Hear real-world examples from in-house teams and legal experts and discover practical steps companies can take to manage risk, ensure global compliance, and implement an effective annual review process.

Panel Discussion



| Tracks: Compliance and Controls, Global Equity

The Weighting Game: Secondary Transactions and Valuation of Equity Awards

The AICPA's proposed updates to Chapters 8 and 9 could significantly reshape how private companies approach the valuation of equity securities—especially in the context of employee secondary transactions. This session breaks down the key changes, explores their impact on financial reporting and taxation, and outlines what cross-functional teams need to know to stay ahead. You'll walk away with a clearer understanding of how to navigate these complex updates across HR, legal, tax, accounting, and stock administration functions.

Panel Discussion



Tracks: Compliance and Controls, Expense Management and Reporting, Trending Topics

Educational Levels:



Foundational



Intermediate



Advanced

OCTOBER 23, 2025

THURSDAY HIGHLIGHTS



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Thursday, Oct. 23 | 8:30-9:30 AM (PT)



Granting Equity Globally? What to Know Before & After

What you don't know before making global grants can create major complications afterward. Learn what to consider both pre- and post-grant—from tax and regulatory obligations to administrative and cultural barriers that affect equity programs. Discover cost-effective strategies for operating stock plans in challenging regulatory environments, and gain insights into less obvious risks companies face when offering global equity compensation.

Panel Discussion



| Tracks: Compliance and Controls, Global Equity

How to Optimize Stock Plan Administration with AI

AI won't replace your team—but it can make your stock plan operations smarter. Learn how to use AI to streamline access to internal workflows and procedures, cross-check transactions, flag compliance risks, and maintain consistency across your equity program. Whether you're building resilience for team absences or just looking to get out of the weeds, see how AI can reduce risk, improve efficiency, and help you manage equity plans with fewer headaches (and more peaceful PTO).

Panel Discussion



Tracks: Artificial Intelligence, Plan Management, Trending Topics

Preparing for an IPO: Equity Compensation Insights

With renewed optimism in the IPO market, companies going public face a range of equity compensation decisions—many under increased regulatory scrutiny. Learn how to approach stock plan design, special IPO grants, and long-term incentive programs in a public setting. We'll also examine considerations for converting partnership equity and aligning programs with shareholder expectations. Gain practical strategies to support retention, pay-for-performance, and successful IPO readiness.

Panel Discussion



| Track: Compensation Strategy

What's Hot, What's Next: 2025 Equity Comp Update

Back by popular demand—and better than ever. Stay on top of the most important equity compensation developments shaping 2025 and beyond. From clawback policies and stock option grant timing disclosures to new rulemaking and emerging litigation, we'll break down what's changing—and what it means for your plans. A live audience poll will guide bonus discussion topics, and we'll wrap with a lightning round of what to watch heading into 2026.

Panel Discussion



| Tracks: Compensation Strategy, Trending Topics

When to Roll the Dice on Stock Plan Compliance

Not every stock plan issue is a crisis—but some are. Explore common legal, tax, and accounting scenarios to determine which concerns warrant escalation and which can be resolved with minimal risk. Learn how to assess potential impacts, weigh practical options, and respond effectively through real-world examples. Walk away with sharper instincts and practical tools for managing compliance decisions with clarity and confidence.

Panel Discussion



| Tracks: Compliance and Controls, Plan Management

Educational Levels:



Foundational



Intermediate



Advanced



Thursday, Oct. 23 | 9:45-10:15 AM_(PT)



409A & Global Equity: Compliance Strategies for Mobile Workforces

Navigating Section 409A compliance in global equity plans presents unique challenges—especially with a mobile workforce and foreign equity awards in play. Learn how to manage compliance for US participants in foreign-parented plans or global employees entering the US market. Explore strategies for handling accelerated vesting, managing cancellations, and leveraging key exemptions to minimize risk and avoid costly tax consequences.

Power Talk ⓘ | Tracks: Global Equity, Taxation

Compensation Accountability Tools: Beyond Clawbacks

Clawback policies are now required—but are they enough? Recent financial scandals highlight the limits of mandatory recoupment and the need for broader compensation accountability tools. Learn what proxy advisors and investors expect, how large-cap companies are expanding policies, and what case studies reveal about effectiveness. Explore practical strategies to strengthen your approach to executive accountability beyond basic compliance.

Power Talk ⓘ ⓘ | Tracks: Plan Design and Features, Trending Topics

ESPPs: Wage Boost or Wealth Accumulation?

Why do employees sell their shares? Uncover emerging trends through exclusive data from 2022 to 2025, and learn how to use those insights to guide your ESPP strategy. Explore how plan design and communication impact employee behavior, and discover ways to promote long-term share ownership—not just participation. Walk away with practical ideas to enhance employee outcomes and build a high-performance, equity-aware culture.

Power Talk ⓘ | Tracks: Compensation Strategy, ESPPs

Managing Double-Trigger RSUs & Liquidity Waivers

Double-trigger RSUs have become increasingly common at private companies—but as early grants approach expiration, tough decisions arise. Should companies let awards expire or modify and pay them out? Explore why the double-trigger structure works globally, the risks involved in “waiver” programs, and how modifying terms could create unexpected tax consequences. Gain insight into the evolving landscape of RSU management ahead of liquidity events.

Power Talk ⓘ ⓘ ⓘ | Track: Plan Design and Features

Proxy Table Efficiency Hacks

Proxy disclosures have become increasingly complex—but building them doesn't have to be. Get practical guidance on streamlining proxy tables and equity-related disclosures using today's stock administration platforms. Learn how to reduce manual effort, improve accuracy, and kick-start compelling narrative development. Gain expert insight into what an ideal proxy table looks like and how to craft disclosures that are both thorough and concise.

Power Talk ⓘ ⓘ | Tracks: Compliance and Controls, Executive Compensation

Educational Levels:



Foundational



Intermediate



Advanced



Keynote



Thursday, October 23 | 11:00 AM-12:00 PM (PT)

The Big Questions You Need to Ask About AI and Your Organization

Nicholas Thompson

CEO of The Atlantic | Tech Journalist | AI Thought Leader

AI is transforming business—fast. On Day 2, Nicholas Thompson, CEO of The Atlantic and former WIRED editor-in-chief, will help you cut through the hype and zero in on what matters most: the real opportunities, the trade-offs, and what to watch next.

With insights based on his years of direct access to AI pioneers like “godfather of AI” Geoffrey Hinton and OpenAI CEO Sam Altman, Nick will equip you with the clarity and strategies you need to navigate AI’s impact with confidence.

Sponsored by:



BANK OF AMERICA





Thursday, Oct. 23 | 12:15-12:45 PM_(PT)



After the Clawback: Accounting & Tax Implications

Clawing back compensation is tough—but handling the tax and accounting aftermath can be even more challenging. Learn the fundamental tax and accounting rules that apply when compensation is repaid or recovered. Gain practical tips to navigate common complications and reduce administrative burden. From W-2 corrections to deduction timing, get clarity on how to manage one of the trickiest aspects of compensation recovery, with real-world insights and audience-driven discussion.

Power Talk



Tracks: Executive Compensation, Expense Management and Reporting, Taxation

Section 162(m) Under ARPA: Are You Ready for 2027?

Changes to Section 162(m) under the American Rescue Plan Act will expand the number and category of covered employees starting in 2027—but preparation needs to start now. Learn how to track covered employees, forecast deferred tax asset impacts, and reduce exposure to future accounting adjustments. Review the evolution of 162(m), what's changing under ARPA, how to distinguish permanent vs. non-permanent covered employees, and strategies for maintaining accurate forecasts as deductions are lost post-2026.

Power Talk



| Tracks: Executive Compensation, Taxation, Trending Topics

Easy ESPPs: Quick Fixes to Boost Efficiency

Small changes can make a big difference. Explore a range of practical updates—from quick process tweaks to more substantial changes—that can enhance your ESPP, minimize risk, and lighten your administrative load. Many improvements require only internal adjustments, with no plan amendments or executive approvals needed. For updates that do need sign-off, discover strategies to streamline stakeholder alignment and move forward with confidence.

Power Talk



| Tracks: ESPPs, Plan Management

Using NQDC to Retain and Reward Executives

Could nonqualified deferred compensation plans be the strategic edge your company needs to attract and retain top talent? Get a quick primer on NQDC essentials, including the benefits of allowing deferrals for RSUs and performance awards, growing concerns around state source taxation, and how NQDC can strengthen executive buyout strategies. Walk away with a clearer understanding of how these plans can add value.

Power Talk



| Tracks: Compensation Strategy, Executive Compensation

Equity Compensation for a Multigenerational Workforce

Different generations respond differently to equity compensation—and understanding those differences is essential to attracting and retaining talent. Learn how to align your equity offerings with the needs and preferences of both your current workforce and the talent you're targeting. Discover strategies to tailor equity plan design and communication to maximize engagement across generations and ensure your compensation strategy reflects today's diverse employee landscape.

Power Talk



| Tracks: Compensation Strategy, Participant Engagement

Educational Levels:



Foundational



Intermediate



Advanced



Thursday, Oct. 23 | 2:15-3:15 PM^(PT)



Deal-Proof Your Comp Plans: What's Trending in M&A

Get the latest data and insights on M&A-related compensation trends from Alvarez & Marsal's 2025 Change in Control Report—including equity award provisions, severance payments, and termination protections. Learn how to prepare your organization for due diligence, spot common red flags, and implement market-based incentive plans when a sale is on the horizon. Gain practical tips and real-world perspectives from legal, consulting, and in-house experts navigating today's M&A environment.

Panel Discussion



| Tracks: Executive Compensation, Plan Design and Features

Examining Use Cases—and Risks—of Vesting Acceleration

Acceleration provisions offer flexibility during M&A and organizational transitions, helping preserve award value and protect recipients. But when used inappropriately, they can raise concerns with shareholders. Explore how companies structure and apply committee discretion, when vesting acceleration may be justified, and when it risks undermining long-term interests. Learn how to balance flexibility with fairness—and stay aligned with stakeholder expectations.

Panel Discussion



| Tracks: Executive Compensation, Plan Design and Features

Financial Reporting for Global Equity Plans

Financial reporting for global equity plans is full of potential pitfalls—especially when dealing with local laws, cross-border requirements, and inconsistent reporting standards. Explore the most common pain points companies face and how to avoid them. You'll gain a clearer understanding of what “getting it right” really looks like—and the benefits that come with running a truly global plan.

Panel Discussion



| Tracks: Expense Management and Reporting, Global Equity

Reddit's IPO Story: Lessons from Year One as a Public Company

Reddit's 2024 IPO was one of the most successful of the year—but going public brought new challenges to its stock plan administration. Hear firsthand from Reddit about their journey to IPO, the unexpected hurdles they've faced since, and the lessons they've learned along the way. Gain insight into what they'd do differently with the benefit of hindsight—and what they're doing now to adapt and thrive as a newly public company.

Panel Discussion



| Tracks: Plan Management, Trending Topics

Smarter Stock Grants: Data, Approvals & AI

Administering stock grants—whether annual or new-hire—requires precision, coordination, and a lot of moving parts. Learn common practices for managing data inputs, preparing materials for approvals and compensation committees, and navigating typical roadblocks in the grant process. Hear how companies are solving recurring issues and where AI might offer practical help to streamline workflows, reduce manual effort, and strengthen accuracy from request to release.

Panel Discussion



| Tracks: Artificial Intelligence, Plan Management

Educational Levels:



Foundational



Intermediate



Advanced



Thursday, Oct. 23 | 4:00-5:00 PM_(PT)



10 Common Drivers of Financial Reporting Complexity

Financial reporting for equity awards gets complicated—fast. This fast-paced overview highlights 10 common triggers of complexity, including modifications, international reporting, acquisition bifurcation, and unusual award designs. Learn what makes these areas challenging, what to watch for, and how companies are navigating them. You'll leave with a sharper understanding of where the red flags are—and where to dig deeper for accurate, compliant reporting.

Panel Discussion



Tracks: Expense Management and Reporting, Global Equity

Across State Lines: Conquering Mobility & Tax Compliance

Managing equity compensation for a mobile workforce means navigating income tax rules in 41 states and DC—each with its own distinct regulatory environment. Explore how to manage income allocation, withholding requirements, business traveler compliance, and locality taxes. Understand how state rules diverge, where companies face the greatest risks, and which best practices can help you stay compliant as employees cross state lines.

Panel Discussion



| Track: Taxation

High Stakes, High Rewards: Requesting Shares without Proxy Advisor Support

In the high-stakes world of equity plan approvals, some companies are securing share pool increases without following traditional proxy advisor frameworks—and winning. Learn how to navigate non-proxy-advisor compliant share pool requests with smart strategies for shareholder engagement, investor targeting, and strategic disclosure. Gain insights to strengthen investor relationships and boost your chances of approval—even when the odds aren't stacked in your favor.

Panel Discussion



| Track: Compensation Strategy

Section 16 & Insider Compliance Today

Stay current on Section 16 and insider compliance with insights from leading experts. Get updates on recent case law, SEC guidance, and activity from the plaintiffs' bar. Learn how recent regulatory outcomes impact your obligations and get practical advice for managing compliance in this high-stakes area.

Panel Discussion



Tracks: Compliance and Controls, Executive Compensation, Trending Topics

Your Executives Need Education Too

Understanding equity compensation isn't just a nice-to-have—it's essential to effective leadership. Hear how two very differently sized companies approached executive education while evolving from time-based to performance-based awards. Their contrasting strategies offer practical insights on how to increase engagement, maximize the impact of your equity programs, and equip executives with the knowledge they need to make informed decisions.

Panel Discussion



| Tracks: Executive Compensation, Participant Engagement

Educational Levels:



Foundational



Intermediate



Advanced

OCTOBER 24, 2025

FRIDAY HIGHLIGHTS



conference.naspp.com





Friday, Oct. 24 | 8:30-9:45 AM^(PT)



AI Productivity Hacks for Stock Plan Administrators

You don't need a massive investment or a dedicated tech team to start leveraging AI in your role. Discover simple, low- and no-cost AI tools that can help you reduce time spent on low-value tasks, improve written communications, and expand your knowledge of stock plan topics. We'll cover responsible AI use, prompting tips, and work through live exercises—including data cleanup, communication drafting, and adapting tone for different audiences. Bring your laptop to work through exercises and learn by doing!

Learning Lab

F **I** | Tracks: Artificial Intelligence, Plan Management, Trending Topics

Equity Comp Shark Tank: Pitching Bold New Ideas

Four industry experts will pitch their boldest equity compensation strategies to a panel of sharks—the audience. You'll size up pitches for a nonqualified ESPP with a seed grant, an exponential equity program, a choice-based equity plan, and a cashless ESPP—each backed by real-world case studies and strategic insights. Tested against wildcard scenarios like market downturns and global expansion, these ideas will battle for your vote to determine which has the greatest potential for success. Leave with fresh ideas, practical lessons, and a sharper eye for what makes an equity program stand out.

Learning Lab

F **I** **A** | Tracks: Plan Design and Features, Trending Topics

ESPP Expense Reporting: How to Get It Right

Accounting for ESPPs isn't just complicated—platform gaps, plan features, and modifications create real challenges for expense reporting. Learn how to get ESPP financial reporting right by accurately valuing ESPPs, properly recognizing expenses, effectively handling modifications, and understanding the impact on EPS.

Learning Lab

I **A** | Tracks: ESPPs, Expense Management and Reporting

Global Taxation: Key Challenges & Strategies

Managing equity compensation for a global workforce presents complex tax, compliance, and design challenges. Learn how to navigate cross-border taxation of equity awards, address risks for mobile employees, and plan effectively for participants in emerging markets. Explore ways to ensure fair access to equity under DEI initiatives and uncover best practices for building tax-efficient, globally equitable compensation plans.

Learning Lab

F | Tracks: Global Equity, Taxation

Unlocking the Formula for Next-Level Executive Services

When it comes to executives, small mistakes can have outsized consequences. These transactions are high stakes, highly visible, and demand meticulous oversight. Backed by insights from the 2025 NASPP Executive Services Pulse Survey, we'll dive into emerging best practices for managing compliance risk, navigating insider filing challenges and EDGAR Next requirements, and optimizing 10b5-1 plans, preclearance processes, and executive education.

Learning Lab

F **I** **A** | Tracks: Compliance and Controls, Executive Compensation

Educational Levels:



Foundational



Intermediate



Advanced



Friday, Oct. 24 | 10:05-11:20 AM (PT)



Aligning Compensation Practices with ISS Governance Standards

Corporate governance standards are evolving rapidly, driven by investor scrutiny, regulatory shifts, and growing ESG priorities; aligning compensation practices with these standards is critical to managing risk and meeting stakeholder demands. Learn a practical framework for strengthening compensation governance and delve into the latest developments to ISS' Governance QualityScore (GQS), focusing on how company disclosures, policies, and practices related to executive compensation and equity plan design can lower risk and meet investor expectations.

Learning Lab



| Tracks: Compensation Strategy, Executive Compensation

Global Reporting and Registration: To Disclose or Not to Disclose?

Issuing equity to a global workforce means navigating a patchwork of disclosure, registration, tax reporting, and data privacy requirements. Learn when public disclosure obligations are triggered, where filings or fees are required, how companies can obtain exemptions, and how enforcement works across jurisdictions. Gain strategies to ensure you stay compliant and minimize risk.

Learning Lab



| Tracks: Compliance and Controls, Global Equity

Practical AI + Excel Tips for Equity Admins & Accountants

Tired of tedious reconciliations, reports, and audits? Let AI and Excel lighten the load! Learn fast, practical, low- and no-cost hacks to automate repetitive tasks, slash errors, and boost your efficiency—no coding required. Watch live demos, tackle real-world challenges, and discover how to make AI your ultimate sidekick for smarter, faster workflows.

Learning Lab



Tracks: Artificial Intelligence, Plan Management, Trending Topics

Top Global Stock Plan Mistakes & How to Fix Them

When it comes to stock plan administration, even small mistakes can carry big consequences. Explore common errors in US and global stock plans and how to address them—including plan misinterpretations, tax withholding and reporting missteps, 409A violations, ESPP operational errors, securities law compliance failures, grant procedure oversights, and governance breakdowns. Learn how to recognize risks early and set up smarter controls to keep your plans—and your company—on solid ground.

Learning Lab



| Tracks: Compliance and Controls, Global Equity

Educational Levels:



Foundational



Intermediate



Advanced



LAS VEGAS
October 21-24, 2025

EQUITY COMP'S GOLD STANDARD EVENT

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