

## Custom Programming

### **Custom Programming Projects**

“Off the shelf” systems rarely meet the needs of everyone. CompIntelligence has years of experience building custom programs to supplement your Stock Plan Administration system. Our developers have worked with most leading stock plan administration systems, including Computershare (Express Options, Transcendive Web Platform), EASi, Citi Smith Barney (Sapphire), UBS, Morgan Stanley, and E\*Trade Financial (Equity Edge). Some examples are:

### **Stock Option Grant Agreement Solution**

This web based solution saves companies time and money over the manual process of distributing hard copy documents to and from thousands of participants worldwide.

- ➔ Allows stock option participants online access to view the stock plan document.
- ➔ Enables online stock option grant acceptance or rejection.
- ➔ Allows for administrative reporting and analysis on various data elements in the grant process.

### **Data Import/Export**

We have created custom import/export routines between Stock Plan Administration systems and Payroll/HR systems, such as Peoplesoft, SAP, and ADP. Data includes employee transaction information, demographic changes, etc.

### **Diluted Options Outstanding**

This application calculates diluted options outstanding and anti-dilutive weighted shares. Detail and summary information can be directly exported to Excel.

### **Automated Stock Option Import and Export**

This tool automates a scheduled import and export for large volumes of data from multiple sources. Data consists of stock option participants, grants, cancellations, exercises, taxes, codes, prices, leave of absence records and broker transactional information. Import status is emailed to the administrator automatically.

### **Broker Order Streamer**

This Real-Time web solution notifies brokers of stock option exercise requests. The solution allows for order fulfillment and immediate database updates.

### **Unique Grant Processor**

This tool facilitates special processing of employee grants at time of termination. A web interface is used to administer processing rules.

### **Online Dividends Application**

This application calculates dividends on RSU's or Options based on customer driven calculations and input parameters. Dividends can either be added to the grant receiving dividends or a new grant can be created. Fractional shares and cash payouts are also handled in this application.

### **Special Termination Processor**

This application allows stock plan administrators the ability to process terminations with special rules that apply to specific groups of grants based on the type of termination. Any number of rules can be created to ensure that each grant is handled correctly.

### **Participant Self Service**

This web application allows participants to view their stock option information online. It also provides real-time trading capability for participants.

### **Participant Service Rep Portal**

This web application allows Participant Service Reps (PSRs) the ability to access an individual participant's online stock option information as though they were the participant. It allows the PSR the ability to see what the participant is seeing and answer questions more effectively.

### **Integrated Voice Response System**

This system allows participants the ability to call an 800 number to retrieve their stock option or stock purchase information. Participants can also initiate exercises, enroll in the stock purchase plan, or change their contributions to the purchase plan.

### **Extensible Application Interface**

This solution was developed to allow access to stock option data through a central set of components. The solution provides consistent business logic and database access for multiple interfaces such as Web Applications and IVR Systems.

### **Dividend Module**

This solution allows you to automatically calculate and report on dividends to be issued. You can select payout frequency as quarterly, semi annually, or annually. Dividends can be either paid out in cash or issued as additional options.

### **Performance Module**

This solution tracks performance outside the system and issues the appropriate number of shares based on the current performance plan. Shares can be awarded based on a percentage of the original grant so that the actual shares awarded can be percentage specified, from 0% to 100% to 200% or more.

#### Programmer Technology Expertise

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#### **Programming Languages**

Microsoft ASP.NET  
Microsoft Visual Studio.NET  
Microsoft .NET Web Services  
Microsoft Visual Basic  
Microsoft VBScript  
Crystal Reports  
C++  
Delphi  
XML  
XSLT  
HTML  
IIS / MST / COM+  
PL/SQL  
T-SQL  
Microsoft Visual InterDev  
Microsoft Visual SourceSafe

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#### **Database, Operating System, & OLAP**

Microsoft SQL Server  
Microsoft Analysis Services  
Oracle  
Hyperion Essbase  
Sybase  
Microsoft Access  
Microsoft Windows 95/98/2000/NT/XP  
Ektron CMS400.Net