

# StockOpter<sup>®</sup>.com

## Equity Compensation Analysis Data Inputs

To create an analysis of your company stock and option holdings using StockOpter.com the following information is needed (*This information will be kept confidential*).

### 1. Basic Information:

Name: \_\_\_\_\_ Company: \_\_\_\_\_  
Ticker: \_\_\_\_\_ Current Stock Price if Private: \_\_\_\_\_

2. **Grant Information:** Please attach a current grant summary statement **with vesting schedule** for your company stock compensation (see sample). Alternatively, you can provide copies of your **Grant Documents**.

Grant ID	Grant Date	Expire Date	Grant Type	Strike Price	Shares Currently Vested	Vesting Date	Shares Vesting	Vesting Date	Shares Vesting
N2012	2/1/2012	2/1/2022	NQSO	10.1234	10,000				
N2015	2/1/2015	2/1/2025	NQSO	20.0567	15,000				
N2017	2/1/2017	2/1/2027	NQSO	25.5000	15,000				
I2019	2/1/2019	2/1/2029	ISO	31.4500	10,000	2/1/2022	5,000	2/1/2023	5,000
R2020	2/1/2020		RSU	0.0000		2/1/2023	5,000		
R2021	2/1/2021		RSU	0.0000		2/1/2024	5,000		

3. **Owned/Long Share Information:** Please provide a list of the company share lots that you own outright (see sample).

Lot ID	Lot Type	Acquisition Date	Acquisition / ISO Exercise Price	Number of Shares	Cost Basis
L1	RSU Vest	2/1/2017	25.5000	5,000	127,500.00
L2	RSU Vest	2/1/2018	27.7500	5,000	138,750.00
L3	ISO Exercise	2/1/2019	20.2500	15,000	303,750.00
L4	ESPP	12/30/2020	32.0000	1,000	32,000.00

4. **Personal Assumption:** Enter the estimated before-tax value of your other investments (Do not include the value of your company stock or options or the value of your personal residence).

5. **Questions:** If you have any questions about the StockOpter analysis or the required information, please contact me at: