



APPLEBY GLOBAL SERVICES

Appleby Global Services (AGS) provides professional trustee and associated administration services in relation to employers' incentive arrangements.

By working collaboratively with our clients and their advisors we ensure that the requirements of the client and their employees are met effectively whilst applying a flexible approach centred in integrity and commerciality.

Specialising in share incentive arrangements, we are expertly positioned to provide services to private equity portfolio companies.

KEY SERVICES:

Trusteeship of Employee Benefit Trusts

AGS provides specialist, professional trustee services for employee benefit trusts to assist companies:

- Facilitate the satisfaction of awards granted to employees;
- Hedge their share and cash plans;
- Create a market where there might not otherwise be liquidity;
- By acting as co-owner in respect of joint ownership arrangements;
- Simplify the management of reward shares during a corporate action.

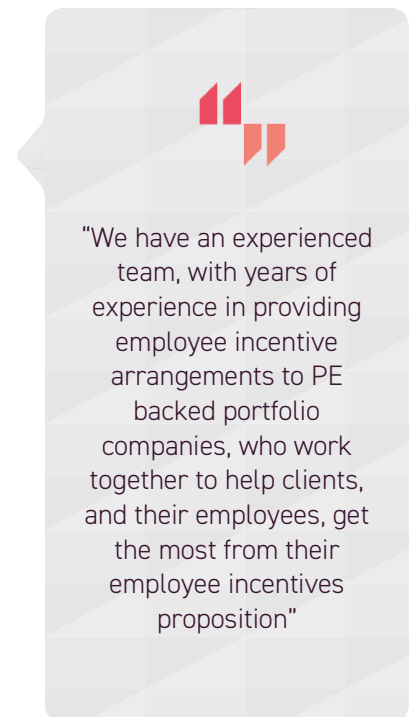
AGS can establish new trusts or replace the incumbent trustee of an existing trust.

Plan Administration

AGS assists companies with their share and cash plan administration requirements, providing expertise whilst relieving the company of the burden.

Nominee Services

AGS provides nominee services, typically to simplify the administration of management incentive plans (MIP), to ensure confidentiality of employee shareholdings and to assist with deferral or holding requirements.



WHY AGS?

EXPERIENCE

The Employee Incentives team at AGS has significant experience in providing specialist trustee services to a vast array of portfolio companies through the full investment lifecycle, up to and including an exit, and beyond.

In addition, the team is well versed in the provision of ancillary services such as share plan administration and nominee arrangements for employees.

CLIENT SERVICE

AGS' primary focus is on client service. We understand the benefit to clients of having clear lines of communication to team members who fully understand their requirements. We apply a flexible, solutions driven approach to client servicing centred on integrity and commerciality.

TEAM WORK

AGS believes in a collaborative relationship with clients, as well as other stakeholders, to ensure that their requirements are met effectively and efficiently.

In addition, the Employee Incentives team works closely with colleagues within AGS to ensure that internal policies and procedures, whilst robust, do not hinder the quality of service it is able to provide (e.g. KYC).

REGULATION

The Employee Incentives team is based in Jersey, providing the benefit of a stable, well regulated jurisdiction which has been the leader in the provision of employee incentive services for upwards of 30 years. AGS is regulated by the Jersey Financial Services Commission.

INDEPENDENCE

Whilst AGS is affiliated with the Appleby Law Firm it maintains its independence, ensuring its ability to work with the best advisors, and other third parties, for each individual client. We are happy to discuss requirements with clients to help determine which additional third parties might be a suitable fit.

TAX BENEFITS

The use of a Jersey trustee can potentially ensure the sheltering of trust assets from Capital Gains Tax.

We work alongside both our Appleby legal partners and a host of appropriate advisors, administrators and brokers in order to fulfil each client's requirements.

KEY CONTACT:



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