

# 20TH ANNUAL CEPI & SILICON VALLEY NASPP SYMPOSIUM AGENDA

TUESDAY JULY 23RD, 2024 8:00 AM – 5:00 PM

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8:00 AM - 8:50 AM **Registration and Breakfast**

8:50 AM - 9:30 AM **Welcome and Keynote Presentation**

- **Creative Concepts for Cultivating Careers**

Presented by: Emily Cervino, CEP, NDEF, Fidelity Investments, Lucy Tang, CEP, CMA, Gilead, and David Nguyen, Amazon

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9:40 AM - 10:40 AM **Session 1**

- **ESPP Supporting Company Culture**

Presented by: Emily Cervino, CEP, NDEF, Fidelity Investments, Shelli White, Nike and Aftab Ibrahim, CEP, CECF, T-Mobile

- **Late Stage Private and Newly Public Technology Companies: Navigating Equity Compensation in a Volatile Market**

Presented by: Thomas Langle, Compensation Consultant, Compensia, and Brandon Gantus, Law Firm, Freshfields Bruckhaus Deringer LLP

- **Ready, Set, Go, Go, Go: Being Ready for the Next Corporate Transaction**

Presented by: Marlene Zobayan, CEP, Rutlen Associates, Laura Verri, CEP, Armanino LLP and Anna Sotnikova, CEP, Cruise

- **Total Compensation in the Ballot Box: Insights Amid Election-Year Economies**

Presented by: Michael Griffin, JD, MBA, CRCP, C(k)P, UBS Financial Services Inc, and Claire Guido, CEP, UBS Financial Services Inc

- **Trend Spotting and Future Forecasting**

Presented by: Nate O'Connor, Equity Methods, Aaron Boyd, Levi Strauss & Co and Courtney Rodgers, Fidelity Investments

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10:40 AM - 11:00 AM **Break**

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11:00 AM - 12:00 PM **Session 2**

- **Deciphering Dividends: Dividend and Dividend Equivalent Payments on Employee Equity Awards**

Presented by: Sinead Kelly, Baker McKenzie, Jeff Bauman, Baker McKenzie and Rachel Ulep, eBay

## LEGEND

• Accounting

• Taxation

*Beginner Track*

• Corporate and Securities Law

• Plan Design, Analysis, and Administration

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- **Modernized Approaches to Payroll Reconciliations**  
Presented by: Tim Oakes, Moss Adams, David Nguyen, Amazon and Eric Deen, CEP, Charles Schwab
- **Navigating Pay versus Performance Disclosures: Learning From Past Pitfalls and Future Insights**  
Presented by: Nate O'Connor, Managing Director, Equity Methods, and Siddharth Thaker, Senior Manager, Equity Methods
- **The Evolution of Data Privacy Regulations in the U.S. and Europe**  
Presented by: Chris Dohrmann, J.P. Morgan Workplace Solutions, and Cynthia Cole, Baker McKenzie LLP
- **The Modern Stock Option (Is Everything Old New Again?)**  
Presented by: Denise Glagau, JD, Baker McKenzie, Bev David, ECA, Veeva Systems, Inc. and Patrick Floyd, CEP, Fidelity Stock Plan Services

12:00 PM - 1:30 PM

## Lunch

1:30 PM - 2:30 PM

## Session 3

- **Accounting 101**  
Presented by: Ryan Ross, CEP, Infinite Equity, and Deidre Salisbury, Infinite Equity
- **Financial Literacy and its Impact on Compensation Rewards: Why Education is Central to Stock Plan Success**  
Presented by: Mark Miller, CEP, Deloitte Tax LLP, and Chris Dohrmann, J.P. Morgan Workplace Solutions
- **I'll Take Cross Border Executives for \$200**  
Presented by: Tara Hagen, CPA, Global Tax Network, Shokiah Williams, CEP, and Lamont Walker, CEP, Lyft
- **IPO Unexpected, Where to Focus Your Time**  
Presented by: Jeanette Kuhl, CEP, Schwab, Alicia Bond, CEP, Hashi Corp and Ritu Aggarwal, Samsara
- **Navigating the Surge: Essential Insights for Mastering Mergers and Acquisitions in 2024**  
Presented by: Jim Kuzmich, Bank of America, Rob Miceli, CEP, AECA, Bank of America, and Debbie Tsio-A-Sue, CEP, Productive Equity Solutions

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2:30 PM - 2:50 PM **Break**

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2:50 PM - 3:50 PM **Session 4**

- **10 Lessons from 25 Years of Global Stock Plans**  
Presented by: Marlene Zobayan, CEP, Rutlen Associates, Amy Lynn Flood, CPA, Vialto, and Stacy Fox, CEP, Confluent
  - **Data Driven: Delving Into Data Dilemmas!**  
Presented by: Elizabeth Dodge, CEP, Equity Plan Solutions, Erika Boyd, CEP, DocuSign, Inc. and Christine Zwerling, CEP, Asana
  - **New Country - New Equity Rules - But That's Just the Start**  
Presented by: Chris Dohrmann, J.P. Morgan Workplace Solutions, and Denise Galgau, Baker McKenzie
  - **Pay Vs. Performance Unveiled: A look at Current Guidance and Actual Disclosures**  
Presented by: Terry Adamson, FGE, CEP, Infinite Equity, and Ryan Ross, CEP, Infinite Equity
  - **Top Five Questions About RSUs**  
Presented by: Barbara Baksa, CEP, NDEF, NASPP, and Emily Cervino, CEP, NDEF, Fidelity Investments
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3:50 PM - 5:00 PM **Cocktail Reception**

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