

Incentive Plans

ESOP, Options & Phantom Shares

CHF 2,500 (excl. VAT)

SUMMARY

Assistance in the design, drafting and/or review, and the implementation, of your company's incentive plans, based on our extensive experience advising founders, management, boards and investors over the entire life cycle of a private company (seed, growth, restructuring, and exit).

PROCESS AND DELIVERABLES



Information gathering

You share with us all available information regarding your company's existing documentation and current practices on shareholdings, incentives, governance, recruitment, employment, and company culture.



Review

We review the material and ask for any additional information that may be required.



Kick-off

We hold an initial 1-hour call or meeting to discuss your options regarding the design and content of the incentive plans (straight, option-based, phantom). We share tailor-made tables and questionnaires to better understand your constraints, culture, and objectives.



Initial draft

We produce an initial draft of a comprehensive incentive plan.



Follow-up

We hold a 1-hour follow-up call or meeting to discuss any comments from you on the initial draft.



Final documents

We produce a fully revised version of the documentation and provide a short description of the implementation process.

■ LIMITATIONS, CONDITIONS AND DISCLAIMERS

Requires successful onboarding as a client of the firm (incl. KYC, conflict checks, and signed engagement letter).

The package does not cover the negotiation of individual granting terms with the plan participants, nor the application for a tax ruling.

Services not included in the package will be charged at standard rates and subject to our engagement terms.

■ CONTACT

If interested, please contact your contact person within ID EST, or write to contact@idest.pro or call +41 21 321 0880.