

Your guide to

GLOBAL SHARE PLANS

Sharesave and SIP



Legal, financial and taxation regulations can be different in countries outside of the UK but it's often possible to offer your global employees share incentives that are similar to those offered to your employees in the UK.

Global or country-specific share plans that comply with local legislation and practices can help your company equalise the benefits offered to employees, wherever they are based.

Global Share Plans often mirror the mechanics of traditional UK plans. They can either be approved plans that take advantage of any local taxation relief or unapproved plans that generally mirror a plan already offered to employees elsewhere within the company but without the same tax advantages. For example, if you offer the approved Sharesave Plan to employees in the UK you may wish to extend this opportunity to employees working within your overseas subsidiaries on an unapproved basis.



YBS Share Plans Global Sharesave Services

- ➔ Communication and engagement campaign management
- ➔ Liaison with all key stakeholders and relevant 3rd parties
- ➔ Webinars and webcast presentations to help educate and raise awareness
- ➔ Application and maturity instruction processing
- ➔ Translated employee portal for inquiries and transacting
- ➔ Allocation of employee contributions to individual accounts (where deposits held)
- ➔ Payroll training and admin support
- ➔ Leaver administration
- ➔ Payment maintenance and closure reports
- ➔ Maintenance of Option register
- ➔ Flexible Option reporting capability (including movements reporting)
- ➔ Annual statements (where deposits held)
- ➔ Maturity share dealing and nominee services
- ➔ Continual service enhancement through proactive use of client and customer feedback

YBS Share Plans are able to support the following plans

- ➔ Global Sharesave / SAYE
- ➔ Phantom plans
- ➔ Stock Appreciation Rights (SARS)
- ➔ US s423 plans

WHERE IN THE WORLD

YBS Share Plans foreign currency deposit taking



YBS Share Plans are able to provide foreign currency deposit taking services in support of global share plans. We currently hold deposits in the currencies listed in the adjacent table:

Where YBS Share Plans are unable to hold particular deposits in the UK we can provide a managed service, where deposits are held locally and YBS Share Plans provide administrative support. The only countries we are unable to support are sanctioned countries such as Iraq and Russia. Countries deemed "high risk" will be considered on a case by case basis and will be subject to additional due diligence.



Currency	Deposits held at YBS Share Plans
Euro	Yes
Japanese Yen	Yes
Hong Kong Dollar	Yes
Czech Krona	Yes
Swiss Francs	Yes
Swedish Krona	Yes
Norwegian Krona	Yes
Danish Krona	Yes
Canadian Dollar	Yes
US Dollar	Yes
New Zealand Dollar	Yes
Sterling	Yes

This list is accurate at the time of going to print (but subject to change). If you would like to discuss deposit taking for any currency other than those listed then please contact us directly using the details provided overleaf.

PUTTING YOU IN CONTROL WITH TAILORED SOLUTIONS

What if you want to take your SIP International?

Extending your SIP internationally can help foster engagement and a sense of common purpose amongst your colleagues around the world. International SIP mirrors the UK SIP in terms of structure, minimum and maximum contribution limits and maximum value of matching shares available. Whilst the Tax Advantaged status (i.e. contributions being deducted from pre-tax salary and relief from CGT) is limited to the UK you can still use Matching Shares to incentivise and reward overseas colleagues who commit to investing their own money in your business.

Employees can buy partnership shares with a monthly contribution of up to £150 per month equivalent in local currency.

Savings are converted from local currency into pounds sterling to buy the shares and then converted back if the shares are sold.

WANT MORE INFORMATION?

If you want to learn more about YBS Share Plans and the types of share plans we administer you can contact us:-

 ybsshareplans.co.uk

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Watch our Global product video to find out more information

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