



Tame your
global tax
monster with
Schwab
EquiView.®

Schwab EquiView now includes expanded global tax capabilities that simplify the complex job of sourcing income and calculating tax withholding across multiple jurisdictions.

EquiView helps to automate sourcing income and calculating taxes related to equity compensation plans. These features help to reduce risk and save time for stock plan administrators, and help to keep participants compliant with tax requirements in the jurisdictions where they live and work.

Here's how Schwab EquiView can help.

Consultative approach.

Your team at Schwab works with you from planning to implementation and beyond.

Rules-based configuration.

Participant mobility information drives application of tax jurisdictions.

Works with equity compensation plans.

Sources income and calculates taxes for events, including transactions, dividends, awards, and dispositions.

Foreign currency reporting.

Track and report equity compensation and tax information in foreign currencies.

Avoid double taxation.

Accommodate tax treaties between countries and reciprocity agreements among states.

Track trailing tax liabilities.

Help participants pay the correct amount of taxes for each jurisdiction.

Customized capabilities.

EquiView's global tax feature has the flexibility to be tailored for your unique situation.

Implement features at your own pace.

Your team at Schwab provides guidance and assistance every step of the way.

Minimal maintenance.

In most cases, only limited jurisdictional updates are required annually.

Ignoring global tax and income sourcing calculations can create a liability nightmare. And it may cause problems for your plan participants, who are responsible for paying taxes correctly.

Call **1-877-362-0410** to learn how EquiView's global tax capabilities can simplify global tax administration.



Own your tomorrow.

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Schwab Stock Plan Services, 9875 Schwab Way, Lone Tree, CO 80124

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