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# 2025 Workplace Survey Stock Plan Participants

## September 2025

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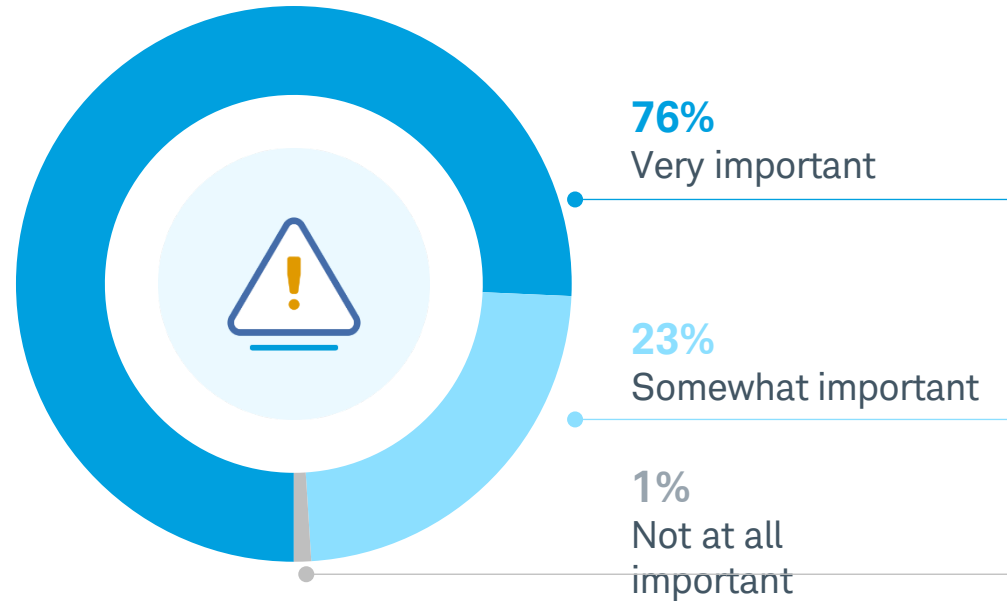
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# Nearly all stock plan participants consider equity compensation important, and three quarters say it is very important

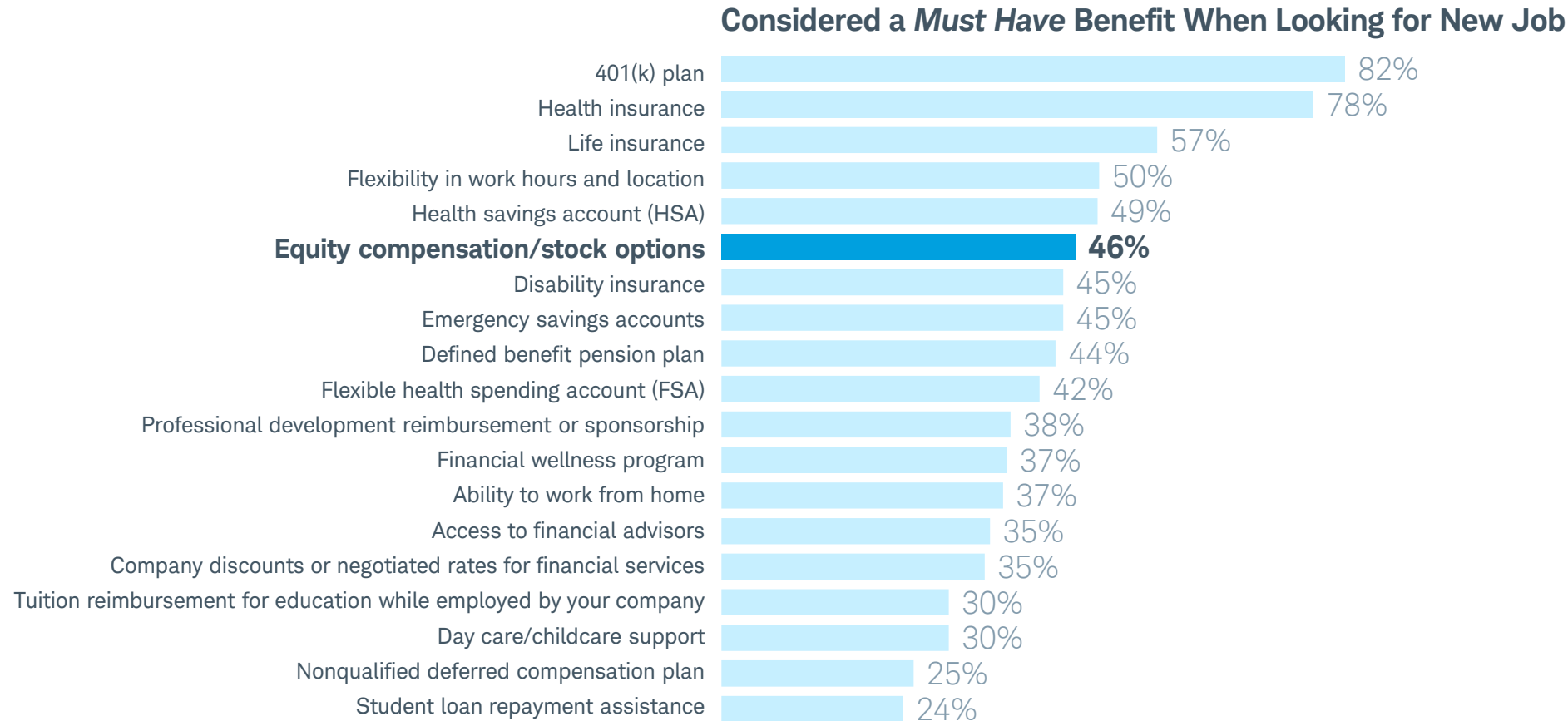
## Importance of Equity Compensation

**99%**

Say equity compensation  
is important to them



# Almost half of stock plan participants consider equity compensation a ‘must have’ benefit



# Half see equity compensation as a tool to reach their retirement goals

## Perceptions of Equity Compensation



# On average, company stock makes up about a third of plan participants' portfolios

## Investment Portfolio Made Up of Equity Compensation



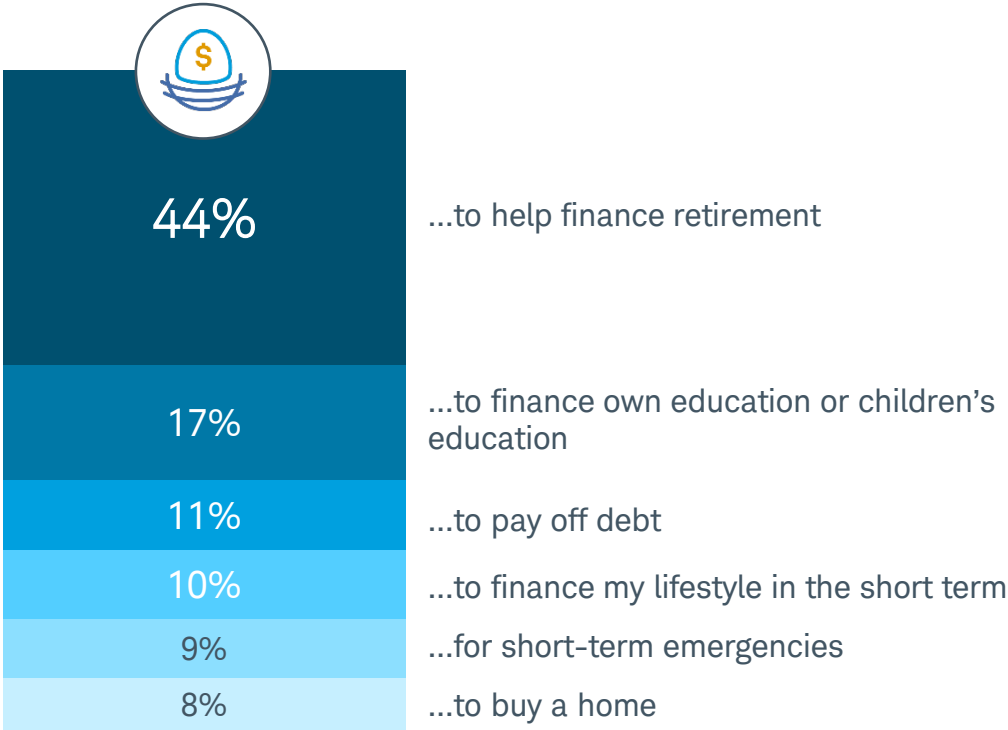
# Nearly all stock plan participants believe they will reach their retirement savings goals, with three quarters who say they are very likely

Likelihood of Achieving Retirement Savings Goals



# Most stock plan participants are planning to use their equity compensation to help finance their retirement

## Plans for Equity Compensation



Which one of the following best describes how you think of your equity compensation relative to your financial goals? (Base: Stock plan participants = 420)

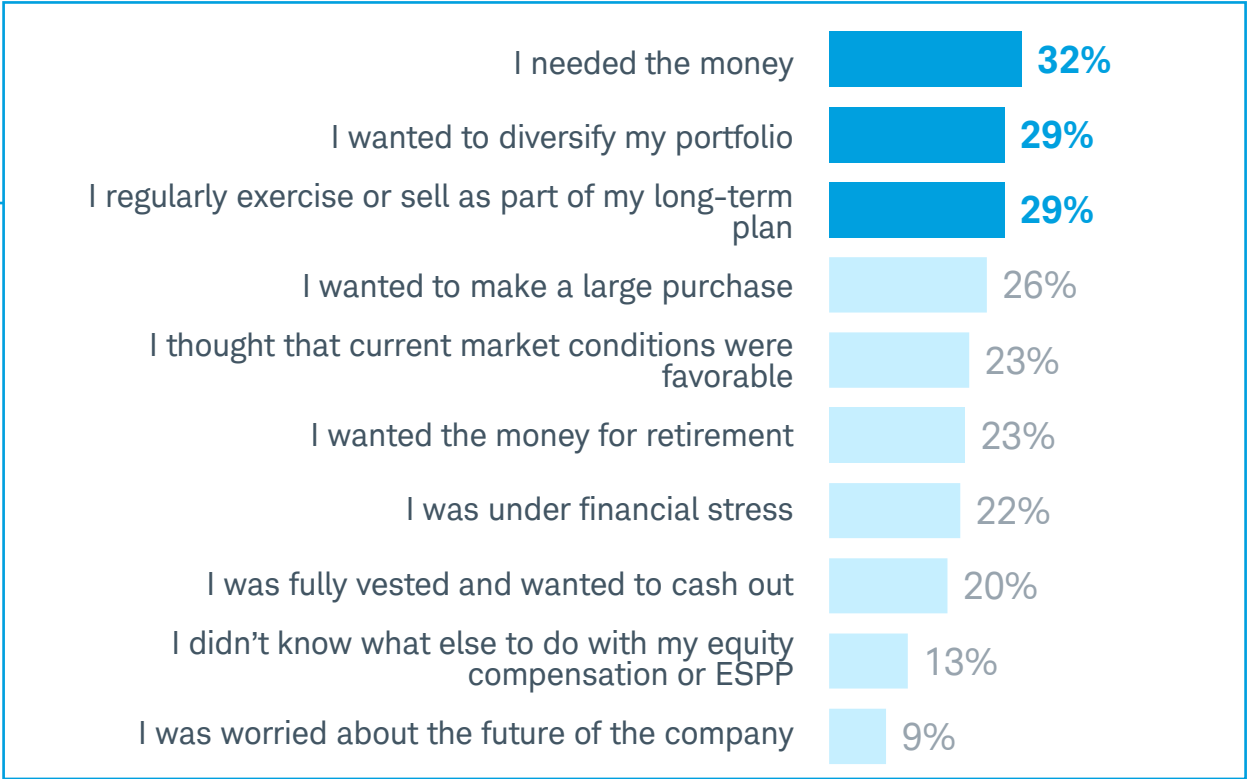
# A third have sold or exercised equity compensation, most likely to meet immediate financial needs, as a part of their long-term plan or to diversify

## Have Sold or Exercised Equity Compensation

33%  
Yes

67%  
No

## Reasons Have Exercised/Sold Equity Compensation

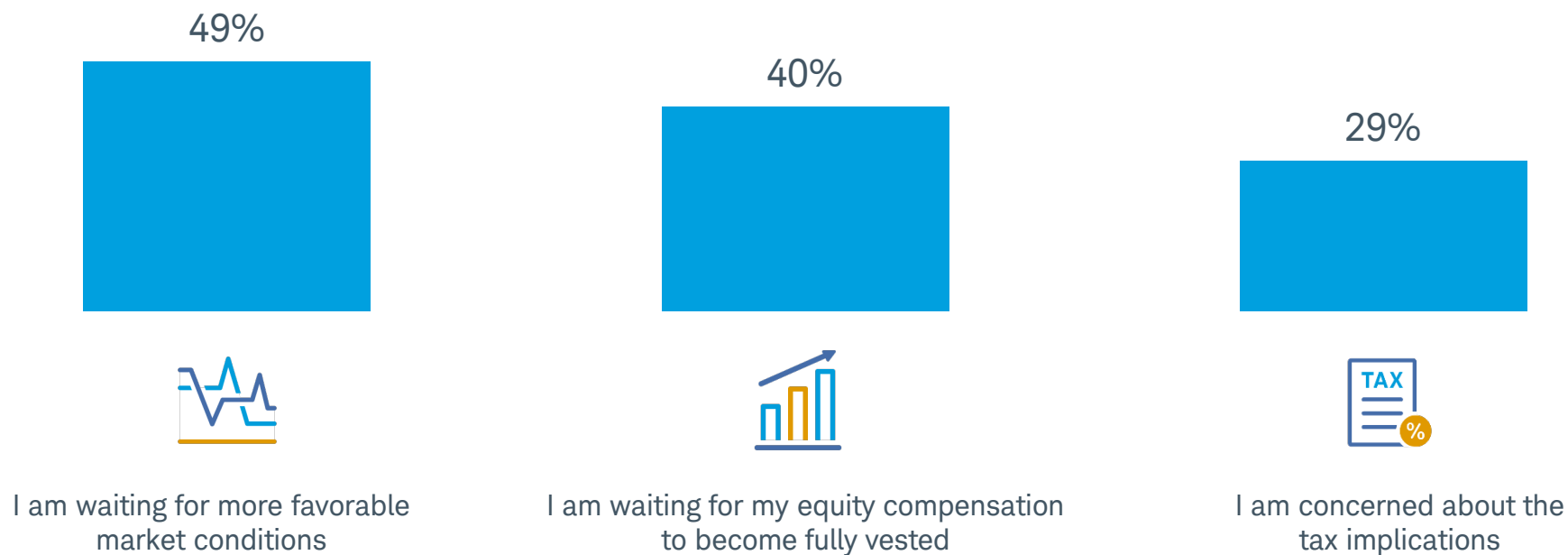


Have you ever exercised or sold any of your equity compensation or ESPP? (Base: Stock plan participants = 420)  
Which of the following best describes why you chose to exercise or sell any of your equity compensation or ESPP? (Base: Stock plan participants who have exercised or sold equity compensation = 138)



# Those who have not sold or exercised their equity compensation are waiting for more favorable market conditions or to become fully vested

## Reasons Have Not Exercised/Sold Equity Compensation



# Two thirds of stock plan participants feel their financial situation warrants advice from a professional



# Those who are working with an advisor are more likely to use their equity compensation primarily to finance their retirement

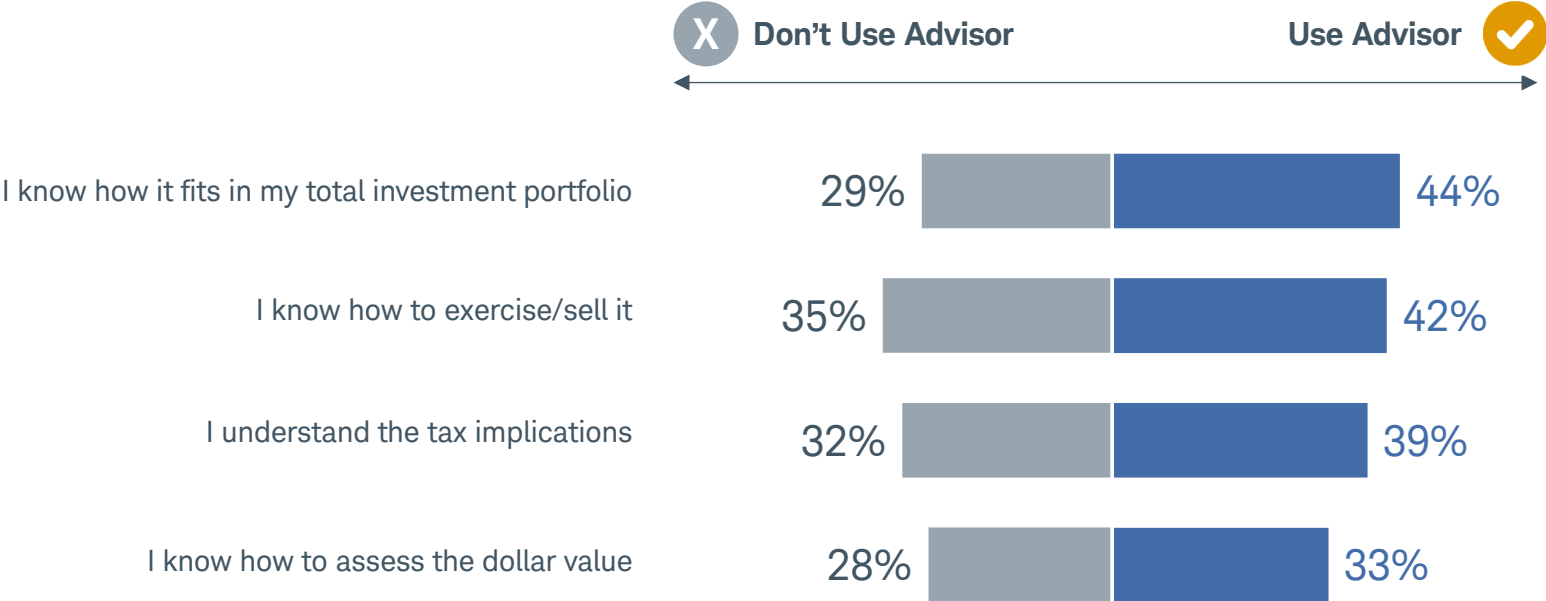
## Plans for Equity Compensation

“I will use it to help finance my retirement”



# Stock plan participants with an advisor demonstrate a stronger understanding of their equity compensation

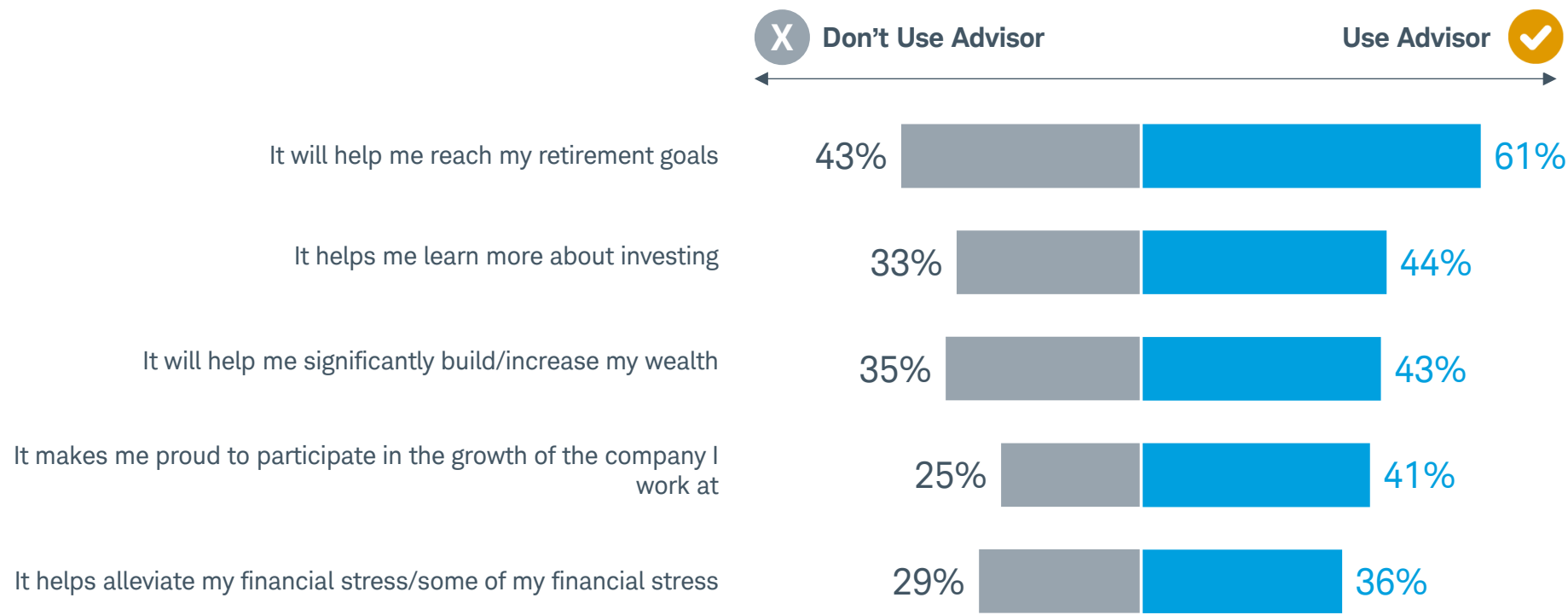
## Understanding of Equity Compensation



Thinking about your equity compensation, which of the following statements apply to you? (Base: Stock plan participants who have an advisor = 174; Stock plan participants who do not have an advisor = 246)

# Stock plan participants with an advisor are also more confident in how their equity compensation can benefit them

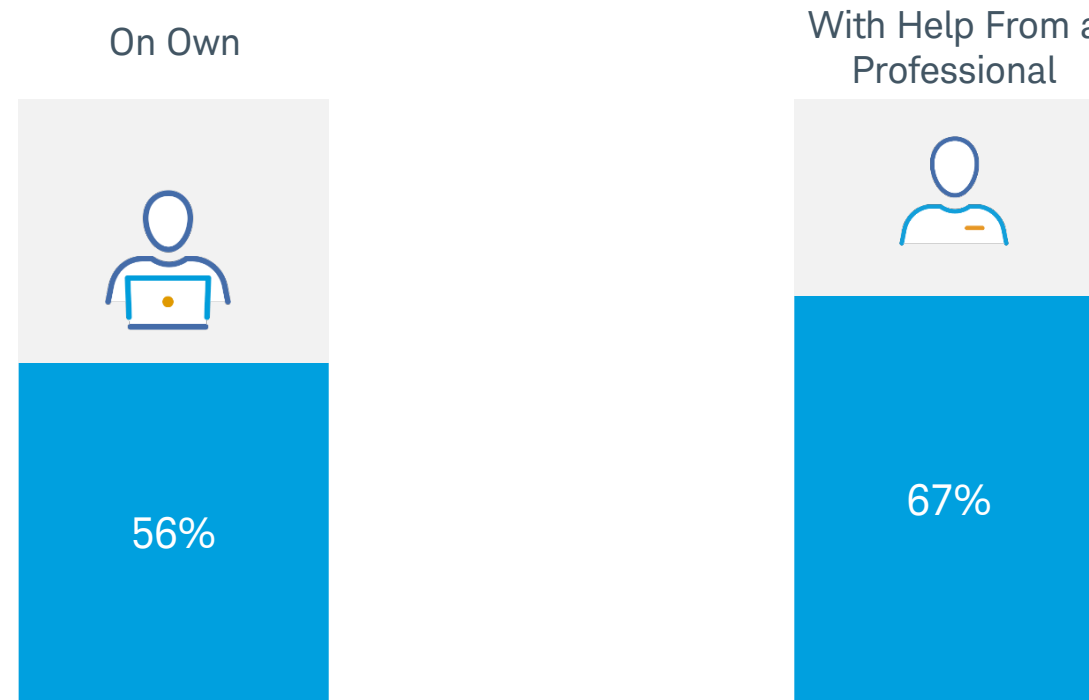
## Perceptions of Equity Compensation



Thinking about your equity compensation, which of the following statements apply to you? (Base: Stock plan participants who have an advisor = 174; Stock plan participants who do not have an advisor = 246)

# Two thirds of stock plan participants would be more confident making decisions with the help of a financial professional

## Very Confident Making Investment Decisions About Equity Compensation

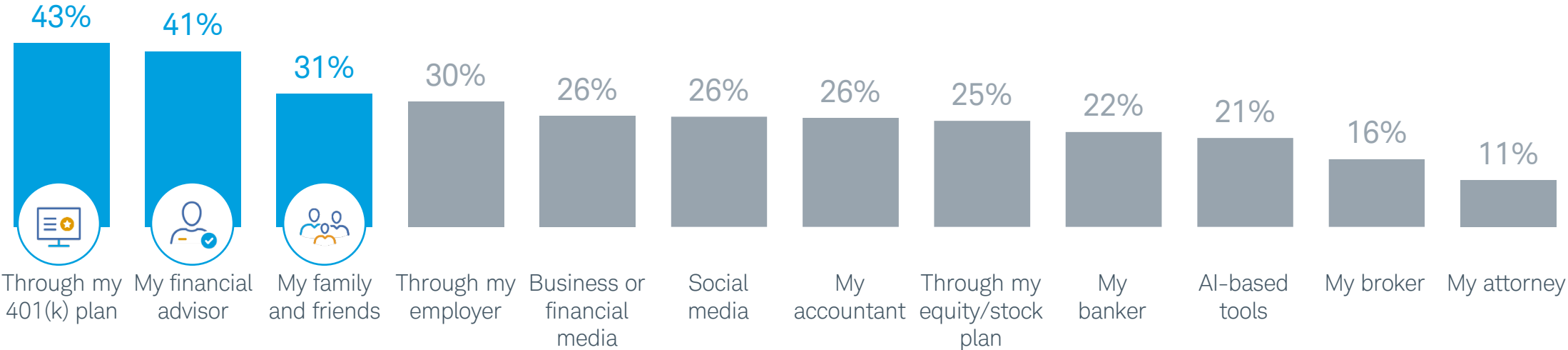


How confident are you in your ability to make the right investment decisions about your equity compensation or ESPP on your own? (Base: Stock plan participants = 420)

How confident would you be in your ability to make the right investment decisions about your equity compensation or ESPP if you had the help of a financial professional? (Base: Stock plan participants = 420)

# More than two in five stock plan participants work with a financial advisor and get advice through their 401(k) plan

## Sources of Financial Advice



Which of the following, if any, are you currently using for financial advice? (Base: Stock plan participants = 420)

# Methodology



The 2025 Workplace Participant survey is an online study conducted by Logica Research.



The study was conducted from April 30<sup>th</sup> through May 17<sup>th</sup>, 2025. The survey length was 10 minutes.



420 stock plan participants completed the survey.

- Ages 21-70
- Currently participate in their companies' equity compensation and/or employee stock purchase program
- Work for companies with 25+ employees that have 401(k) plans
- Currently contribute to their companies' 401(k) plans



# Disclosures

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