

## Incentive Plans (ESOP, Phantom)

**Price:** CHF 2,500 (excl. VAT)

**Summary:** Assistance in the design, drafting and/or the review, and 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



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



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



We hold an initial 1-hour call or meeting to discuss your possible 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.



We produce an initial draft of a comprehensive incentive plan.



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



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

## Limitations, conditions, and assumptions

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.

If interested, please send an email to [contact@idest.pro](mailto:contact@idest.pro) or call us at + 41 21 321 0880.