

# FRS EQUITY STRATEGIES

We are a full-service educational institute for the Equity Professional!

Outsourcing, Consulting and Training for Equity Compensation

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**Course Code: CEP 500**

**Course Title: CEU Program for CEPs and Equity Consultants**

**CEU Credit: 8 units**

**Summary:** The Continuing Education Unit Program (CEU) is designed to provide CEPs with advanced level equity compensation instruction to ensure the knowledge and expertise of the CEP is maintained at the consultative and advisory level. The Course is designed to cover all four categories of the CEP certification program: Accounting, Equity Administration and Design, Taxation, and Corporate and Securities Law. The Course content is updated every year in February.

An Equity Consultant will benefit from this Course as it provides the full scope of knowledge that is required for a Certified Equity Professional designation.

The CEPI requires 30 units of continuing education (CE) every two years for the CEP to retain their certified designation. "The CE requirement is a logical step for ensuring that the CEP designation remains the preeminent symbol of knowledge and integrity within the equity professional field. The field has become increasingly complex and the pace of change so rapid that the CE requirement helps to ensure that the skills and knowledge of CEP designees continue to be current and are viewed as committed to ongoing professional development." (CEP Institute, [cepi.scu.edu.com](http://cepi.scu.edu.com))

The Program is designed to allow one Unit of CE credit for every hour of class time. Classes are one-half hour or one hour in length.

## **Program Description:**

- 12 Webinars – Classes are 12 individual classes within the complete Program that add up to 8 hours of instruction.
- Classes are one-half hour or one hour in length and allow one Unit of CE credit for every hour of class time.
- You have access to a CEP Instructor with your questions during the Program.
- Recommended Book to assist with your learning process: The Stock Options Book, 10<sup>th</sup> Edition. (see below for where to order)
- Certificate of completion to confirm your attendance hours for CEU credit.

**Course pre-requisite:** You should be an active or inactive CEP, i.e. you have passed all three levels and are certified as a CEP. In lieu of the CEP designation, you may be an Equity Consultant with at least five years of experience and are attending classes that will present the full scope of the knowledge that is required for a CEP.

Webinars:

1. Adv Admin\_Part 1\_Equity Comp Types, Unusual Features, Purpose – 30 mins
2. Adv Admin\_Part 2\_Transactions\_Legal Documentation – 30 mins
3. Adv Admin\_Part 3\_Desgin\_Modifications\_Repricing – 30 mins
4. Adv Admin\_Part 4\_Internatiol and Mobile Considerations – 30 mins
5. Adv Tax\_Part 1\_Early Exs, ESPP, Employer regs – 60 mins
6. Adv Tax\_Part 2\_ISO regs, Modifications, 409a – 60 mins
7. Adv Law\_Part 1\_Secur Law, Corp Gov – 30 mins
8. Adv Law\_Part 2\_SEC '33 Act – 30 mins
9. Adv Law\_Part 3\_SEC '34 Act – 30 mins
10. Adv Acctg\_Review of FAS123(R) concepts – 60 mins
11. Adv Acctg\_Part 1\_FAS123(R) Application – 60 mins
12. Adv Acctg\_Part 2\_EPS, 10K disclosures, IFRS-2 – 30 mins

**Designate a total of 8 hours to complete this Course.**

***\*\*\*It is recommended that you complete the Course within 4 weeks from your start date. A CEP Instructor will contact you at the end of 4 weeks to verify and confirm your attendance to all classes within the Program.***

Equity and CEP Instructor: Marianne Brannock-Hill, CEP CTP

Communication: During the Course, if you have any questions, please email a CEP Instructor with your questions at “training@equity-strategies.com”.

Book: Stock Options Book (10<sup>th</sup> Edition), Baker, Alisa; published through NCEO

**Registration Process:**

- 1) Go to the url [www.equity-strategies.com](http://www.equity-strategies.com)
- 2) Click on the Training Link.
- 3) Click on the CEP Programs link on the left.
- 4) Find the CEU Program from the list of classes.
- 5) Click on this link and follow the registration steps.
- 6) The FRS Training Coordinator will see you registration as soon as you have completed the registration steps.
- 7) You will be given a confirmation of your registration.
- 8) As soon as payment is received, you will be sent an email with your Access Instructions.
- 9) If you have any trouble with this process, please call the Training Coordinator and you will be assisted with your questions. Phone: 1-408-727-0227.

**Access Instructions: Once you have registered and been given access:** Go to [www.frsequitystrategies.com](http://www.frsequitystrategies.com) and at the left bar on the homepage click on the Student Login. There you can enter in your e-mail address that you signed up with and your password. The next screen will display the course(s) you signed up for.

If you have any questions, please call 408-727-0227 or e-mail Training@Equity-Strategies.com

Marianne Brannock-Hill, CTP CEP  
Lead Instructor, FRS Equity Strategies, Corporate Equity Education division