

UNLOCK YOUR MAGIC IN ORLANDO

Breakthrough
Insights.
Powerful Connections.



ORLANDO
October 12-15, 2026

Early Bird Deadline: July 24, 2026 • Register at conference.naspp.com

Why the NASPP Conference?

If you work in equity compensation—as an administrator, accountant, attorney, HR professional, or compensation strategist—there is no event more focused on your success than the NASPP Conference & Exhibition.

Each Fall, more than 1,000 equity compensation professionals gather for three days of intensive learning, peer connection, and practical discovery. The 2026 conference comes to Orlando October 12–15, delivering the same gold-standard program that has earned the NASPP Conference its reputation as equity comp's #1 event.

World-Class Content

Best practices, benchmarks, and strategies you'll use immediately—delivered by the field's leading experts.

Unparalleled Community

Collaborative relationships with equity comp's most experienced practitioners—built over four days and sustained year-round.

Career-Defining Moments

Ideas that transform your approach, your team, and your results—long after you return to the office.

Built for Every Role in Equity Compensation

Equity Plan Specialist

Admin best practices, survey data, trends, participant education

Finance & Accounting Pros

ASC 718, diluted EPS, forecasting P&L impact, cost-effective program design

HR & Total Rewards Leaders

Award design for performance, equity as financial wellness, DEI factors

Legal & Compliance

SEC regulatory updates, proxy guidance, insider trading compliance

Global Comp Professionals

Global tax compliance, country-specific regulatory updates, mobility best practices

Startup & Private Company Teams

Cap tables, IPO readiness, private company LTI design, early exercises

Who We Are

The National Association of Stock Plan Professionals (NASPP) is the leading membership organization for equity compensation professionals. With thousands of members spanning corporate issuers, law firms, financial institutions, and service providers, the NASPP delivers the education, resources, and community that equity compensation teams rely on to stay informed, stay compliant, and advance their careers.



What Attendees Are Saying

“

Attending the NASPP Conference changed the trajectory of my career and launched me into an incredible community of thought partners and practitioners that I've come back to again and again.

— **Laura Gallerance**
CEP, VP Global Rewards
and M&A

“

One thing I get at the NASPP Conference that I don't find anywhere else is 1000+ people who completely get my job. I love connecting with like-minded people!

— **Angela Blair Serrano**
Manager, Total Rewards

“

The NASPP Conference is a must for anyone who deals with equity compensation. It's the best and easiest way to learn and succeed in the field.

— **Karen Needham**
CEP, FGE, NDEF, Associate
Director, Payroll & Equity
Compensation

“

I'm still buzzing with excitement! The NASPP Conference was an incredible way to connect with brilliant stock plan minds, learn about the latest trends, and gain valuable insights.

— **Tyrell Siagi**
Senior Stock Plan Administrator

Our History



33+
Years of
Excellence



1,500+
Expert
Speakers



19,000+
Happy
Attendees



Cumulative totals across NASPP Annual Conference history

Featuring Speakers From

We bring together practitioners, advisors, and thought leaders from some of the world's most recognized organizations. Our speaker roster spans public companies, private companies, law firms, accounting firms, and equity compensation service providers—giving you a breadth of perspective you simply won't find anywhere else.

Amazon
American Electric Power
Asana
Atlassian
Carnival Corporation

D-Wave
Edwards Lifesciences
Eli Lilly
EQT Corporation
GoodRx

Intuitive Surgical
Meta
NVIDIA
Palo Alto Networks
Pinterest

Plaid
Reddit
T-Mobile
Tesla
Zscaler

Full speaker lineup available at conference.naspp.com/speakers

At-A-Glance Schedule

All times Eastern. Times and Programs are subject to change. Full schedule details at conference.naspp.com/agenda

Monday
October 12

8:00 AM - 5:00 PM: 2026 Proxy Disclosure Conference *(optional add-on)*
8:30 AM - 12:30 PM: Executive Compensation Essentials Bootcamp *(optional add-on)*
8:30 AM - 4:00 PM: Equity Compensation Bootcamp *(optional add-on)*
4:00 - 5:00 PM: Opening Celebration *(all-conference kickoff event)*

Tuesday
October 13

8:30 AM - 4:30 PM: NASPP Conference Sessions
All Day: 23rd Annual Executive Compensation Conference *(free for NASPP attendees)*
All Day: Expo Hall Open

Wednesday
October 14

8:30 AM - 5:00 PM: NASPP Conference Sessions
All Day: Expo Hall Open
6:30 PM: NASPP After Party

Thursday
October 15

8:30 AM - 1:30 PM: NASPP Conference Sessions

The Sessions: What You'll Learn

This year's program spans 10+ distinct content tracks and features 50+ sessions covering every dimension of equity compensation. Whether you're building foundational knowledge, sharpening advanced technical skills, or staying current on regulatory change, there's a full slate of sessions tailored to your experience level and professional goals.

Panel Discussions

Multi-expert deep dives with real case studies

Power Talks

TED-style rapid-fire insights and hot takes

Peer Roundtables

Small-group facilitated problem-solving

Learning Labs

Hands-on, laptop-based workshops



Artificial Intelligence

Build It Live: Use AI to Craft Equity Education Content

Work hands-on with ChatGPT, Gemini, Copilot, and Claude to transform a real RSU FAQ into a polished participant education presentation. Facilitators guide you through prompt construction, output evaluation, and content refinement—then the group examines where AI falls short in regulated comp environments.

Education Level: Intermediate

From Add-On to Built-In: Real-World Lessons from Embedded AI

Most AI in equity administration sits at the surface. This session goes deeper, examining what actually changes when AI is embedded directly into platform workflows. Real issuer panelists share lessons learned, measurable impact, and where expectations fell short.

Education Level: Intermediate / Advanced

Practical AI Tools for Equity Administration

Cut through the noise and focus on what's actually useful now: real applications, real tools, and real examples of AI making equity administration faster, smarter, and less error-prone. No technical background required.

Education Level: Intermediate

The Stock Plan Administrator of 2029: Future-Proof Your Role

The role is shifting from technical execution to strategic leadership. Build a clear roadmap for the next three to five years: bridging the gap between data processing and executive influence, integrating emerging technologies responsibly, and securing your position as an indispensable partner.

Education Level: Intermediate



Compensation Strategy

Broad-Based Equity or ESPP? Strategies From Companies That Get It Right

Weigh broad-based equity grants against an ESPP—or a blend of both—through three real-world examples. Leave with a framework to determine which strategy best fits your organization's culture, talent strategy, and financial goals.

Education Level: Intermediate

Creative Approaches to Balancing Long-Term Vesting Expectations & Short-Term Needs

Hear real-world examples and 2026 season benchmarking on creative vesting approaches—hybrids, milestone vesting, longer holding periods, and front-loaded structures—that preserve retention value and reduce stakeholder risk.

Education Level: Intermediate / Advanced

Executive Pay & TSR: Evidence That Pay-for-Performance Works

Examine the evidence showing how award payouts correlate with total shareholder return and gain practical strategies for using PVP data to ensure executives are motivated and aligned with shareholder interests.

Education Level: Intermediate / Advanced

Equity for Innovators: Attract & Retain Tech's Hardest-to-Hire Talent

See how innovators like D-Wave use simplified, targeted, disciplined programs that resonate with tech workers. Take away real-world examples and tools to make equity a true competitive advantage in R&D-driven cultures.

Education Level: Intermediate

From Cash to Capital: The Rise of Stock-Based Bonuses

More employers are paying short-term incentive bonuses in stock rather than cash. Get a clear look at the forces driving this shift and frameworks for structuring programs that align performance, manage cash, and support retention.

Education Level: Intermediate / Advanced

Founder's Perspective: Fundraising, Valuations, Cap Tables & Exits

A seasoned M&A banker-turned-founder perspective on cap table strategy, focusing on the pre-IPO mistakes that derail exit opportunities—poor dilution planning, misaligned incentives, messy cap tables, and compliance gaps.

Education Level: Foundational

Riding the Waves: Making Sense of Volatility in Stock Plans

See exactly what volatility is, where it comes from, and how industry, market, and economic swings affect equity compensation—including the effect on equity awards and the opportunities volatility creates.

Education Level: Foundational



Compliance & Controls

10b5-1 for Everyone: Expanding Trading Plans Beyond the C-Suite

Broad-based 10b5-1 trading plans offer a clear path for equity-holding employees beyond the C-Suite. Explore legal considerations, critical design elements, and real-world results—including how Pinterest reduced risk and created more predictable liquidity.

Education Level: Intermediate / Advanced

From Guesswork to Guardrails: Building a Reliable Equity Planning Model

Get tools to model burn rate, overhang, and stock plan expense with clarity and precision. Learn a framework to increase cross-functional alignment, avoid common forecasting errors, and communicate dilution and P&L impact with confidence.

Education Level: Intermediate / Advanced

Future-Proofing Compliance: What New SEC Disclosure Rules Mean for You

Anticipated updates to SEC executive compensation disclosure rules will reshape how organizations prepare and govern compensation reporting. Evaluate readiness across data, systems, and controls before the final rules arrive.

Education Level: Intermediate / Advanced

Mastering Share Pool Management: Forecasting, Reconciliation & Planning

Build a repeatable process to align forecasting, reconciliation, dilution analysis, and replenishment planning—keeping urgent share requests, governance risk, and investor scrutiny at bay.

Education Level: Intermediate



ESPPs

Beyond the Desk: ESPP Strategies for Deskless Employees

ESPP participation among warehouse staff, field technicians, and retail associates consistently lags. Unpack design features and targeted communication strategies that drive awareness, accessibility, and sustained participation regardless of role or work environment.

Education Level: Intermediate / Advanced

Top ESPP Trends

Get the latest benchmarks from the 2026 NASPP/Deloitte Tax ESPP Survey—covering trends in economic and tax benefits, participation constraints, employee education, plan management, and global practices.

Education Level: Foundational / Intermediate / Advanced

Executive Compensation

Creative Performance-Based LTI: Beyond the Standard Playbook

Examine real-world examples of non-traditional performance-based awards—strategic business initiatives, multi-year performance periods, metric multipliers—and learn how to disclose these awards and navigate accounting valuation implications.

Education Level: Intermediate / Advanced

Planning for the 162(m) Expansion & the New Proxy Disclosure Landscape

Beginning in 2027, Section 162(m) expands to cover five additional highly compensated employees. See exactly what the expansion means, how companies are preparing now, and what 2026 proxy trends mean for governance.

Education Level: Intermediate / Advanced

What's Hot? What's Next? Public Company Equity Comp Design & Disclosure

Detailed expert updates on SEC rulemaking, Reg S-K comment solicitations, shifting proxy advisor dynamics, Section 162(m) post-TCJA realities, and what Delaware courts are signaling on fairness and independence.

Education Level: Intermediate / Advanced

Section 16 & Insider Compliance Today

Get updates on recent developments in Section 16 and insider compliance—case law, SEC guidance, and plaintiffs' bar activity—plus advice for managing compliance in this high-stakes area including upcoming Form 5 and Item 405 disclosures.

Education Level: Advanced



Expense Management & Reporting

ASC 718 & Performance Awards: An End-to-End Admin & Reporting Roadmap

Build an end-to-end roadmap from interpreting award terms to system setup, data dependencies, and expense behavior—navigating internal, market, and dual metric designs while preventing downstream issues in tax, EPS, proxy, and PVP reporting.

Education Level: Intermediate / Advanced

Advanced ASC 718: Hybrid Awards, Retirement Eligibility & Modifications

Hybrid awards, retirement eligibility attribution, and award modifications all require greater judgment and cross-functional coordination. Develop a framework to evaluate complex awards and anticipate accounting implications.

Education Level: Advanced

Diluted EPS and Equity Awards: The Mechanics That Matter

Walk through the mechanics under ASC 260: how equity awards flow into the treasury stock method, common pitfalls, and the impact of share withholding and net settlement on reported dilution.

Education Level: Advanced

Equity Compensation & Tax Accounting: A Guide for Stock Admins

Build a clear framework connecting day-to-day stock administration to deferred tax assets, realized tax benefits, and effective tax rate—understanding how data integrity and cross-functional coordination drive financial reporting accuracy.

Education Level: Advanced

Getting Auditor Buy-In for Equity Reporting Changes

Cover common change triggers—attribution method shifts, forfeiture approach refinements, valuation updates—and get your guide for translating those changes into a well-documented package that meets ASC 718 requirements and earns auditor trust.

Education Level: Intermediate

Global Financial Reporting Bingo: Multinational Reporting Challenges

In an interactive BINGO format, tackle US GAAP vs. IFRS friction, subsidiary data delays, global mobility impacts, and international retirement provisions—leaving with practical approaches to streamline the close process.

Education Level: Foundational

Private Company Equity Valuations: Navigating the New AICPA Guidance

Discover how evolving AICPA valuation expectations affect financial reporting, audit scrutiny, and equity program administration for private companies with complex capital structures and observable secondary transactions.

Education Level: Intermediate / Advanced



Participant Engagement

Helping Employees Unlock Equity Value

Drawing on an exclusive survey of share plan participants, learn specifically how employees perceive, value, and engage with equity awards—what drives participation, where understanding breaks down, and why demand for financial education is rising.

Education Level: Foundational

Ready, Set, IPO! Energize Participants with IPO-Ready Education

Equip employees with education that sticks—live workshops, interactive tools, and tech platforms that reach every employee, everywhere. Complex topics become clear actions: taxes, trading windows, blackout periods, and compliance dos and don'ts.

Education Level: Foundational

The Equity Plan Reality Check: 5 Things Employees Wish You Knew

Financial advisors who specialize in executives with equity comp share the five most common disconnects between plan design and employee experience—and how thoughtful adjustments can dramatically improve understanding and company loyalty.

Education Level: Foundational

Plan Design & Features

Creative Performance-Based LTI: Beyond the Standard Playbook

See how companies have used strategic business initiatives, multi-year performance periods, and market-based metrics to reward executives—plus how to disclose these awards in the proxy and navigate accounting implications.

Education Level: Intermediate / Advanced

From Proposal to Approval: Maximize Your Share Request

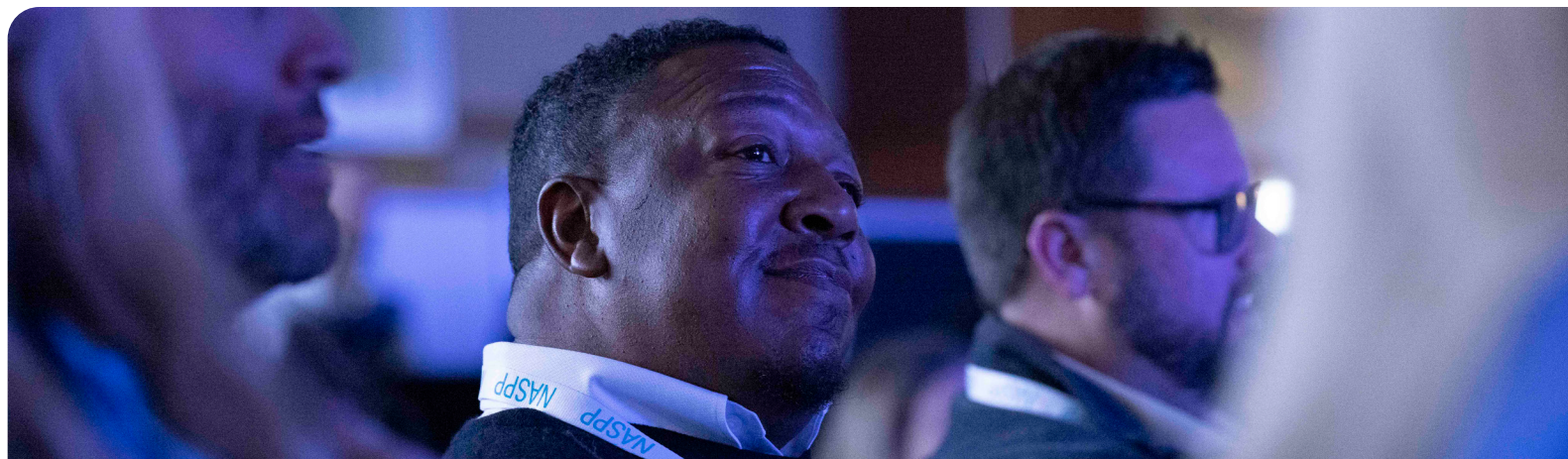
Cut through the uncertainty with a clear look at the approval process, including best practices, trends in plan design, and common drivers of shareholder opposition. Get hands-on experience with the ISS Equity Plan Scorecard.

Education Level: Intermediate / Advanced

No Ticker, No Problem: Winning LTI Designs for Private Companies

Dig into LTI vehicles, essential metrics and award valuations, liquidity strategies, vesting schedules, and the unique regulatory advantages of the private company environment.

Education Level: Intermediate



Plan Management

6039 & You: Deadlines, Data & the IRS's New Filing System

Take a close look at how Forms 3921 and 3922 work—from data intake through filing—including a deep dive into the IRS's new IRIS filing system. Walk away knowing where delays most commonly occur and how to ensure accurate, on-time filing year after year.

Education Level: Foundational

Administering Stock Awards Through Death, Divorce, Leaves & Retirement

Experienced advisors walk through real-world scenarios that fall outside the standard playbook—what questions to ask, what documents to review, and where administrators most often get stuck when major life events collide with equity administration.

Education Level: Intermediate

Equity Admin Modernization Playbook for Emerging & Mid-Cap Companies

Get a modernization playbook covering scalable administration, automated reporting, participant self-service tools, and system integration—plus frameworks for handling headcount changes, M&A, RSU/ESPP complexity, and mobility.

Education Level: Foundational

Equity in M&A: Managing Plans Through Mergers, Acquisitions, and Spinoffs

Real lessons from recent transactions reveal how equity teams can anticipate challenges, blend plans effectively, and support employees through change—with a framework for creating continuity across programs.

Education Level: Intermediate

Managing Equity Through Organizational Change: Lessons from the Field

Get real-world experience on planning timelines, anticipating pressure points, and building resilience into equity operations—and learn how automation, HR system integration, and shifting team dynamics are reshaping the work.

Education Level: Intermediate

Monsters in the Closet: Lessons from Automation Nightmares

Through real equity administration failures—broken integrations, missing approvals, and poor handoffs—unpack what goes wrong and why. Get clear guidance on detecting risks early and responding transparently when something breaks.

Education Level: Intermediate / Advanced

Private Company Tender Offers: The Tax & Stock Operations Playbook

Get real lessons on running a successful employee liquidity program—from understanding tax implications of offering a premium above 409A to launch readiness, employee education, and day-of withholding and reporting realities.

Education Level: Intermediate / Advanced



Plan Management (continued)

Termination Trepidation: When Terminations & Leaves Go Off Script

Do you accelerate vesting? Toll it? Extend the post-termination exercise period? How do you manage taxes without a W-2? Get real-world guidance on the situations that arise when plan documents go silent.

Education Level: Intermediate

Winning Executive Buy-In: Secure Investment in Stock Plan Initiatives

Get strategies for building a compelling case that resonates with CHROs, CFOs, and the executive suite—framing initiatives around retention, employee experience, cost efficiency, and risk mitigation.

Education Level: Foundational

Taxation

Equity & Payroll Taxes: What Works, What Fails & What Auditors Ask

Dig into the most common and complex payroll tax issues: withholding methods, tax deposit timing, the FICA special timing rule, dividends, foreign director issues, and 83(b) election developments. Leave knowing how these surface in audits.

Education Level: Foundational / Intermediate

The IRS and Treasury Speak

Get direct access to IRS and Treasury staffers. Catch up on the latest tax laws, regulations, and ongoing IRS projects impacting stock compensation—plus the rare opportunity to raise your own questions directly with department representatives.

Education Level: Intermediate / Advanced

Trending Issues

The Pre-IPO Waiting Room: Don't Waste the Wait

IPO timelines slip—sometimes 12 to 36 months. Use the extra time wisely: clearing IPO debt, working through five essential readiness pillars, and reaching Stage 3 IPO-Ready maturity without the scramble.

Education Level: Intermediate

Equity for Recruitment & Retention: What's Working Right Now?

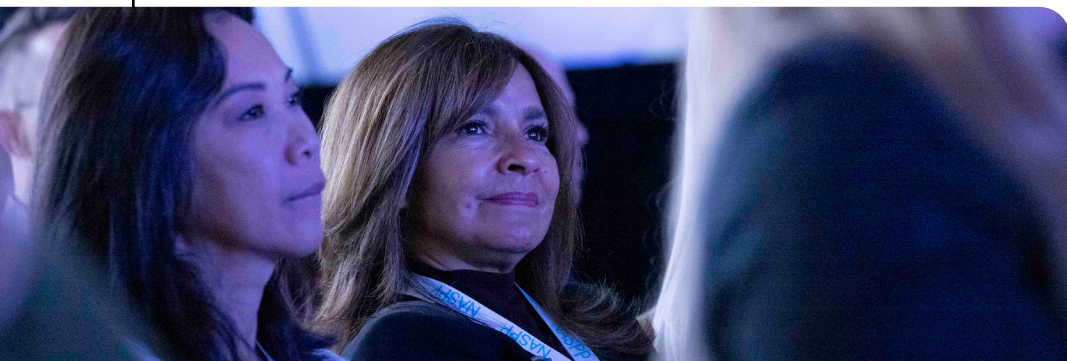
How are companies using equity to attract and keep top talent in today's fiercely competitive market? Share strategies, compare practices, and discuss how equity plans are evolving to win the AI talent war.

Education Level: All Levels

AI in Action: How We're Using AI to Transform Equity Administration

Share your AI journey, hear what's working across the industry, and find useful ways to bring AI into your stock plan practice in this peer-driven discussion session.

Education Level: All Levels



Our Exhibition Partners

The NASPP Annual Conference Expo Hall is equity compensation's largest gathering of solution providers—where you can meet face-to-face with trusted partners, discover new technologies, and find the tools that move your program forward. Our 2026 exhibition partners include the following organizations:

Platinum Exhibition Partner

J.P.Morgan
WORKPLACE SOLUTIONS

Gold Exhibition Partner



Silver Exhibition Partners



Bronze Exhibition Partners



Morgan Stanley
AT WORK

Chrome Exhibition Partners



Full partner list at conference.naspp.com/expo-hall



A large conference hall with a stage and audience. The stage is lit with blue light, and a speaker is visible. The audience is seated in rows of chairs, and the hall has a high ceiling with exposed lighting rigs.

SECURE YOUR SPOT

Early Bird Deadline:
July 24, 2026

Register before July 24 to lock in early bird savings and join hundreds of equity compensation professionals who will be transforming their practice in Orlando this October.

Need Help Getting Approval?

conference.naspp.com/convince-your-boss



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Learn More & Register
conference.naspp.com