



# EsopCentre

Employee Share Plans:  
Beyond the 1%

British Isles Symposium  
2024

**Thursday, 25 April 2024**

London

**WHITE & CASE**

# British Isles Symposium 2024

## Employee Share Plans – Beyond the 1%

The theme of the 2024 symposium will focus on increasing productivity through an uplift in the percentage of total equity in employee ownership.

In a keynote speech, Lorraine Young, a Chartered Governance Professional, NED and accredited mediator, will examine the theme— if at least 10 percent of equity is in the hands of employees, this should give productivity a boost and benefit all investors.

The Esop Centre's seventh British Isles Share Schemes Symposium, will be split into two sections:

- Background material: The speakers presentations will be broadcast as 20-minute webinars during April, the recordings of which will be available to delegates along with relevant papers.
- Live session: face-to-face event to network and discuss the topics of the day.

The live session, in White & Case's Central London offices from 13:30 on Thursday, 25 April 2024, will feature four interactive panel debates.

The symposium will conclude with the presentation of the 2023 *newspad* awards and a celebratory reception.

---

Sponsor



The original share scheme & equity management platform  
[www.vestd.com](http://www.vestd.com) | [www.vestd.com/contact](http://www.vestd.com/contact) | [www.vestd.com/get-started/](http://www.vestd.com/get-started/)

# Programme

## Global Share Plans

- Restrictive covenants in the context of share plans - **White & Case**
- Would US style ESPPs offer a simpler multi-jurisdiction solution? – **Baker McKenzie**
- Long term incentives for a mobile workforce - **Macfarlanes**

## Employee Share/Share Option Plans In SME Companies

- Employee Ownership Trusts: managing direct share ownership in an EOT controlled company - **RM2**
- Navigating valuation issues for unquoted UK companies - **CMS**
- Growth shares: risks and rewards - **Deloitte**

## Anticipating Issues In Executive Reward, Investor Guidance, And Communications

- Foreseeing future issues in executive remuneration - **MM&K**
- Key issues in updates to institutional investor guidance for 2024 and its impact on share plans – **Tapestry Compliance**
- Communication and networking skills for share plan uptake - **Global Shares**

## The Future Of All-Employee Share Ownership Plans

- The impact of tax in tax advantaged share plans, including a case study of the M&S Sharesave Maturity – **Equiniti**
- How employee share plans form part of an individual's personal financial planning – **Wealth at Work**
- Enhancing productivity, social mobility and levelling up through direct employee share ownership – **David Craddock Consultancy Services**

*The organisers reserve the right to alter the programme as necessary.*



Delegates from **plan issuer companies** may attend **free** of charge.



# British Isles Symposium 2024— Programme

## Programme Guide

13:30 - arrivals

13:45 – Chairman’s welcome

13:50 – Keynote speech—**Lorraine Young**, Chartered Governance Professional, NED and Accredited Mediator

14:00 – White & Case’s speech, including intro to first panel.

14:15 – 1<sup>st</sup> panel - **Global Share Plans**

14:50 – 2<sup>nd</sup> panel - **Employee Share/Share Option Plans In SME Companies**

*15:25 – tea break*

15:50 – 3<sup>rd</sup> panel - **Anticipating Issues In Executive Reward, Investor Guidance, And Communications**

16:25 – 4<sup>th</sup> panel - **The Future Of All-Employee Share Ownership Plans**

17:00 – Closing remarks

17:05—Sponsor’s address

17:15 – Awards presentations

17:30 – Drinks reception

18:30 – Finish

*The organisers reserve the right to alter the programme as necessary.*

---

Book your place now.

Please send delegate name and contact details to:

[events@esopcentre.com](mailto:events@esopcentre.com)

Telephone inquiries: +44 (0)20 7562 0586 or complete the booking form on the back page of this brochure.

---

# British Isles Symposium 2024—Speakers

**Speaker panel will include:**

**Baker McKenzie**

**CMS**

**David Craddock Consultancy Services**

**Deloitte**

**EQ**

**Global Shares**

**Macfarlanes**

**MM&K**

**RM2**

**Tapestry Compliance**

**Wealth at Work**

**White & Case**

---

## **Cancellation policy:**

If you have to cancel your conference registration, you will receive a 90% refund of your fee if you cancel two or more months in advance (the 10% deduction covers administration charges). Owing to the financial obligations incurred by the ESOP Centre, our further refund policy for this conference is:

- ◆ Less than two but more than one month before the conference date, we shall refund 50%
- ◆ Less than one month before, there will be no refunds though you will have the option of substituting another person from your organisation to attend in your place

## British Isles Symposium: April 2024

### Booking form

### London

**To book please complete this form and email to: [Juliet\\_wigzell@zyen.com](mailto:Juliet_wigzell@zyen.com) or call +44 (0)20 7562 0586**

**Multi-booking discount:  
50% off cost of ticket for your third delegate.**

	Issuer	Provider/ Adviser	Trustee
Please reserve ___ member places	<b>FREE</b>	£450*	£400*
Please reserve ___ non-member places	<b>FREE</b>	£800*	£650*
There will be opportunity to attend remotely if you are unable to travel to London. Please state whether attending: <input type="checkbox"/> in person, <input type="checkbox"/> remotely			
Your details:			
Company			
Contact person			
email			
telephone			
Address			
Delegate name			
Delegate name			
Delegate name			

All prices are subject to UK standard rate **VAT**

The venue:

White & Case  
5 Old Broad Street  
London EC2N 1DW

Delegates are responsible for their own travel arrangements.

Nearest national rail stations: London Liverpool Street or Moorgate

Nearest underground station:  
Bank, Liverpool Street or Moorgate

International:  
St Pancras or Stratford

*Please see the Centre's cancellation policy on page five of this brochure*

### About the Centre

The **Employee Share Ownership Centre**, is a non profit organisation which draws from over 30 years of experience to inform, lobby and research in the interest of broad-based employee share ownership in the UK and Europe. Its membership consists of share plan advisers, trustees and plan user companies.

**Become a member:** Join the Centre to enjoy discounted rates at events and many other benefits. Contact us at [esop@esopcentre.com](mailto:esop@esopcentre.com) or call +44 (0)207 562 0586