

Product / Service Comparison

Shareworks™ PREMIER	Shareworks™ DIRECT	
✓	✓	<h3>Compliance</h3> <p>Reduce reconciliation time through high-level data integrity and accuracy</p> <p>Have complete confidence of data security through an external audit with SAS-70 (Type II) report</p> <p>Safeguard against inaccuracies through comprehensive audit trails</p> <p>Decrease risks and inaccuracies by eliminating error-prone manual processes</p> <p>Ensure all recent regulatory and/or policy requirements are followed (software is hosted by Solium and automatically upgraded for new regulations)</p>
✓	✓	
✓	✓	
✓	✓	
✓	✓	
✓	✓	<h3>Recordkeeping and Reporting</h3> <p>Gain instant access to a comprehensive list of pre-configured reports for financial statements, expensing requirements, proxy reports, quarterly reports and more</p> <p>Streamline reporting processes by customizing and saving specific reports for the use of any stakeholder (HR, Compensation, Treasury, Finance and Payroll, etc.)</p> <p>Rapidly extract financial disclosure and plan reporting in real time</p> <p>Easily manage all plan activity, including new grants, participant census data, blackout periods and more</p>
✓	✓	
✓	✓	
Imported / managed by Solium	Imported / managed by client with Shareworks' online tools	<h3>Administration</h3> <p>Transition painlessly from existing processes or administration – plans are easily migrated to Shareworks®</p> <p>Alleviate administrative workload through employee empowerment and automation of manual processes</p> <p>Eliminate manual monitoring of plan rules through automatic process and restrictions</p> <p>Easily manage employee data with configurable groupings, mobility tracking, new grant uploads, etc.</p> <p>Easily configured for varying levels of user access and security clearance</p> <p>Simplify administration by condensing plan types on a single platform</p> <p>Learn quickly with live interactive web training</p> <p>Access the entire Solium Solutions Team</p> <p>Access your own assigned Account Manager</p> <p>Access your own assigned administration team</p> <p>Manage Employee Groups and Mobility Tracking</p>
NO	YES	
YES	NO	
YES	NO	
Solium	Client	
✓	✓	<h3>Employees</h3> <p>Take advantage of direct access to markets, and the ability to transact in real-time</p> <p>One account, login and screen for all award types received</p> <p>Instant access to markets and plan awards, no need to go through the process of opening up a personal brokerage account</p> <p>Simple and easy online transactions with self-serve online capabilities – no need to submit paperwork or contact HR or administrator</p> <p>Gain total control of your account – update contact and bank info., view transaction history and print statements any time</p> <p>Experience flexible options for transactions (market, limit or sell to cover orders; tax deferrals; tax withholding, etc.)</p> <p>Access assistance from Solium's Participant Services Group for transactions, password and account access help</p> <p>Access assistance from Solium's Participant Services Group for full account assistance, including specific plan-related help and direction</p>
✓	✓	
✓	✓	
✓	✓	
✓	✓	
✓	✓	
YES	YES	
YES	NO	