



Company Background

OptionEase is standardizing compliance by delivering an integrated “on-demand” platform that enables collaboration and oversight across key business stakeholders.

Products & Services

The company’s flagship product is a web-based equity administration, valuation and compliance solution. The company has enhanced the application with complimentary modules such as full equity and capitalization table management as well as employee stock purchase plan functionality.

OptionEase is staffed by an expert team of accountants, CPAs and stock plan administrators to provide full implementation, customer service and audit support.

Value Proposition

OptionEase provides all the features necessary for day-to-day administration of equity plans, comprehensive financial and regulatory reporting and full audit compliance capabilities. It satisfies the needs of all constituents including the CFO, the administrator and the auditor.

Customer Commitment

“OptionEase pledges to be on the leading edge of application development for FAS, SEC, IRS and IFRS rules and regulations and we guarantee that you will successfully pass the equity compliance portion of your audit.”

Kimberly Kovacs, CEO

Quick Facts

Founded: 2006

Headquarters:
San Juan Capistrano, CA

Product Engineering and Support:
100% U.S. Based

Venture Capital and Private
Equity Backed

Customers: Over 400 Worldwide

Customer Retention Rate: 98%

Average Annual Growth: 230%

Awards & Certificates

2010 Red Herring “Global 100
Most Promising High-Tech
Companies”

2009 Southern California
Venture Network (SCVN)
Emerging Start-up

2007, 2008 and 2009 SAS 70
Type II Certificates



Vertical Market Focus

Software & Internet	Medical Device
Life Sciences	Clean Technology
Semiconductor	Communication
Financial Services	Consumer Packaged Goods
Pharmaceutical	Media



Alliance Members

Professional Service Firms (CPA, JD)
Interim Financial Executive Service Companies
Business Process Outsource (BPO)



Data Security

World Class Data Center - Savvis
SAS 70 Type II
128-bit Secure Socket Layer (SSL) Encryption
Complete Redundancy and Failover



Data Access

99.999% Guaranteed Uptime
100% Software-as-a-Service (SaaS)
Accessible from any web browser and personal digital assistant (PDA)



Integration Capabilities

Full Enterprise Application Integration (EAI) –
Microsoft, IBM, SAP & Oracle
Brokerage – Merrill Lynch, UBS, Wells Fargo and
others as needed

“The entire process, from sales demo to implementation, was smooth and OptionEase was very accommodating plus we get the value of having experts assist with our FAS No. 123(R) stock option accounting and reporting.”

B. Kalsu
CFO SolarWinds, Inc.

“We chose OptionEase after considering several other solutions in the market. The implementation process finished on time which enabled us to roll out option grants to close to 3,500 participants. We are delighted and strongly recommend it.”

K. Sudheendra
CFO UST Global, Inc.

“OptionEase was able to implement our client and bring their stock option accounting in compliance within a matter of days, enabling us to keep to our audit schedule.”

N. Curtis
Frank, Rimerman + Co. LLP