

Employee Shares:

Rewarding your Key People
Without Losing Control



Giving employees equity is one of the most significant decisions a business owner can make. Done well, it retains your best people, aligns interests and drives long-term growth. Done poorly, it creates legal complexity, tax liabilities and lasting damage to the relationship. Our structured process ensures you get it right.

OUR PROCESS

01
STAGE

WHAT ARE WE TRYING TO ACHIEVE?

DISCOVERY WORKSHOP

We begin with a dedicated workshop with the business owner to understand the commercial objective.

- Why do you want to give employees shares?
- What behaviour are you trying to drive?
- Who are you trying to reward - and when?

- Define the goal before choosing the vehicle
- Understand the business growth trajectory
- Identify the right candidates for equity
- Set realistic timelines and expectations

02
STAGE

WHAT ARE THE OPTIONS?

EQUITY & NON-EQUITY PATHWAYS

Not every solution requires actual share ownership. We map your objectives to the right vehicle from full equity to synthetic alternatives and explain the commercial and tax implications of each.

- Ordinary shares, growth shares, share options
- Phantom shares & LTIPs
- Growth By Sharing™ (GBS) for broader teams
- Comparison of tax treatment & legal complexity

03
STAGE

BUILDING THE INCENTIVE PLAN

STRUCTURING THE RIGHT DEAL

Once the right vehicle is selected, we design the complete incentive plan, including valuation, hurdle rates, vesting schedules, leaver provisions and shareholder agreement amendments.

- HMRC-approved valuation (where required)
- Vesting schedules tied to performance or time
- Watertight leaver provisions from day one
- Alignment with your exit or succession strategy

04
STAGE

EMPLOYEE COMMUNICATIONS & IMPLEMENTATION

LAUNCHING WITH CONFIDENCE

A scheme only works if employees understand what they have and why it matters. We manage the full implementation from employee briefings to legal documentation, HMRC filings and ongoing administration.

- Employee communications pack
- Legal documentation & secretarial filings
- HMRC notifications and EMI registration
- Ongoing support and annual reporting