

DIRECTIONS FOR STOCK PROGRAM WORKSHEET

This worksheet consists of 4 different pages/tabs that will link together to save you time in calculating the stock distributions for up to 1,000 employees.

Each page follows this color coding:

- Grey cells – contain the formulas or links
- Green cells – where you'll need to enter data
- White cells – there for your information but not vital to making all the links work.

The file can be used for 2 different stock programs, such as Stock Options, Restricted Stock, etc.

Targets per Band page – This page is where you will set the stock allocations for both programs, by filling out the eligible grades/bands, and then assigning the allocation amounts for Min, Target and Max. You can set different amounts for the 1st and 2nd programs or leave 2nd program blank if the band is not eligible for both.

Grade	Stock Options			Restricted Stock		
	Stock - Program 1			Stock - Program 2		
	Minimum	Target	Maximum	Minimum	Target	Maximum
A	50	100	150	100	150	200
B	50	100	150	100	150	200
C	50	100	150	100	150	200
D	50	100	150	100	150	200
E	50	100	150	100	150	200

Stock Key Page – In this page you will enter the possible performance ratings and then select what each performance rating should receive – Min, Target or Max allocations.

Performance Ratings Page – In this page all you will need to do is copy and paste the employee ID's and their performance ratings, so these can link into the main page.

Stock Details page – In this page everything comes together based on what has been entered in the other pages. Simply copy and paste your employee information and then review for any missing performance ratings and/or the recommended allocations.

- In columns A – L – this is employee data that you can enter more or less as needed, but the only columns that are needed to calculate the allocations are the –
 - Employee ID (to pull in the performance ratings)
 - Salary band or grade (to pull in the recommended allocations)
 - If you don't need all the extra columns in A-L you can right click and hide the ones you don't need, or rename them if there is other information you'd like to add.