

myStockOptions.com Overview

myStockOptions.com is the **leading resource on equity compensation**

for:

- 1) the millions of people who participate in stock plans;
- 2) their financial and wealth advisors
- 3) stock plan professionals at companies, consulting, and law firms

We deliver a unique, hard-to-reach niche audience

The screenshot shows the myStockOptions.com website homepage. At the top, there is a search bar and navigation links for Tax Center, Global Tax, Newsletter, Glossary, Discussion, About Us, and Home. There are also buttons for SIGN IN and REGISTER. Below the navigation is a secondary menu with links for MYRECORDS, MYTOOLS, MYLIBRARY, and MYCLIENTS. The main content area is divided into several sections:

- Become a Premium or Pro Member:** A section with a photo of a group of business professionals and text encouraging users to become smarter about stock options, ESPPs, restricted stock, and stock appreciation rights.
- Individuals:** A section for individuals, stating "Whether you're a stock plan participant or a professional, we offer you content and tools to fit your needs." with a "Learn More" link.
- Corporate:** A section for corporate users, stating "Help your employees understand and appreciate their stock grants and prevent tax mistakes." with a "Learn More" link.
- Financial and Wealth Advisors:** A section for advisors, stating "Track your clients' grants and give them the expert advice they demand." with a "Learn More" link.
- Podcasts:** A section for podcasts, with a "Listen to our podcasts" link.
- Featured Article:** A section titled "Restricted Stock Units Made Simple (Part 1): Understanding The Core Concepts" by Matt Simon. It includes a "NEW!" notice and a "Read the rest of this article" link.
- More Featured Articles:** A list of three articles: "How Tax Rate Changes Impact Your Stock Grant Strategies (Part 2): Restricted Stock", "Restricted Stock: Tax, Financial, Estate, And Retirement Planning (Part 1)", and "When To Wait, Hold, Or Sell: A Wealth Manager Reveals His Wisdom On Stock Option Exercise Strategy (Part 1)".
- New and Updated Content:** A section with three items: an FAQ about expenses, commissions, and fees for exercising stock options; an article about key dates and terms for a company's ESPP; and an FAQ about restricted stock and stock option grants in privately held companies.
- Articles On...:** Two columns of article titles: "Why You'll Learn To Like Restricted Stock Grants" and "How To Avoid The Most Common Stock Option Mistakes (Part 1)".

myStockOptions.com Proposal

myStockOptions.com offers a balance of branding and lead-generation placements:

Branding: Reach users while they browse, read, and do research in our dynamic content, including articles, FAQs, and interactive tools.

Leads: Ad placements in myRecords and our calculators, where they are seen by grant-holders and advisors actively viewing stock grant portfolios and measuring gains.

Email opportunities: Our quarterly newsletter and stand-alone emails with a sponsor-designed message.

myStockOptions.com Advertising

Channel: myRecords

Interstitial page shown to users before they access the myRecords portfolio-tracker, where users track their stock grants, often daily.

The screenshot shows a Windows Internet Explorer browser window displaying the myStockOptions.com website. The browser's address bar shows the URL: <https://www.mystockoptions.com/myrecords/index.cfm?RequestTimeout=60>. The website's navigation menu includes links for My Account, Tax Center, Global Tax, Newsletter, Glossary, Discussion, About Us, and Home. A search bar is located at the top left. The main content area features a navigation bar with links for MYRECORDS, MYTOOLS, MYLIBRARY, and MYCLIENTS. Below this, there are several tool icons: Options Calculator, SARs Calculator, Res Stock Calculator, Money, Records, Compare, and Saved Scenarios. A prominent blue banner reads: "See the Total Pre-Tax Gain for Your Options, Restricted Stock, and SARs. This sophisticated options, restricted stock, and SARs tracker provides you with valuable information, such as vesting and expiration dates. **NEW FEATURES!**".

The main content area is titled "myRecords" and includes a share price of DTAS at \$10.86 as of 12/18/2001. It offers options for "Add Grant", "Edit Grants", "Grant Alerts", and "Print". Below this, there are tabs for "Total Grant View", "Individual Grant View", and "Graphs". A large orange interstitial advertisement is displayed, titled "Have You Heard About HSO Pro, Our New Service For Advisors?". The ad lists several benefits of upgrading to HSO Pro:

- Grant tracking and modeling for multiple clients
- Client portal where your clients have special access to a confidential, highly secure site to see their grants online
- Co-branding of your firm's identity in the client-accessible site
- Grant alerts reminding you of important dates and target values for each of your clients, plus the flexibility to send alerts to selected clients
- Create and save scenarios for you and your clients from any of the calculations you run in our tools
- All our exclusive articles by leading experts in financial planning, tax and securities law, and stock-based pay
- 570+ FAQs on all aspects of equity compensation
- PDF versions of articles, FAQs, and all tool results that you can send your clients, all co-branded with your name and firm.
- Reports on your clients, individually and in aggregate

At the bottom of the ad, there are two buttons: "Tell me more about HSO Pro" and "No thanks, I'll go to myRecords".

myStockOptions.com Advertising

Channel: myRecords

728 x 90 advertisement at the top of the myRecords pages.

The screenshot shows the myRecords page in a Windows Internet Explorer browser. The page features a navigation menu with links for MYRECORDS, MYTOOLS, MYLIBRARY, and MYCLIENTS. Below the navigation is a search bar and a "LOG OUT" button. A prominent orange advertisement placeholder is located at the top of the main content area, with the dimensions "728 x 90" visible in the top right corner. Below the placeholder, the "myRecords" section includes a "Calculate" button and a table of share prices for various stocks. The main content area is divided into two sections: "Outstanding Option Grants" and "Outstanding Stock Appreciation Rights". Each section contains a table with columns for Stock, Shares Granted, Shares Unvested, Shares Exercisable, Total Exercise Cost, Total Value Vested, and Total Gain Vested. To the right of each table is a pie chart showing the distribution of Total Cost and Total Pre-Tax Gain. The "Outstanding Option Grants" section shows a total cost of \$432,000.00 and a total pre-tax gain of \$451,361.25. The "Outstanding Stock Appreciation Rights" section shows a total gain of \$29,005.80 and a total gain of \$117,694.20. The page also includes a "Total Grant View" tab and a "Print" button.

Stock	Shares Granted	Shares Unvested	Shares Exercisable	Total Exercise Cost	Total Value Vested	Total Gain Vested
INTC	52,000	8,875	42,125	\$432,000.00	\$883,361.25	\$451,361.25
MYSTOCK	1,000	750	250	\$0.00	N/A	\$0.00
Totals:	53,000	9,625	42,375	\$432,000.00	\$883,361.25	\$451,361.25

Stock	Rights Granted	Rights Unvested	Rights Exercisable	Total Gain Unvested	Total Gain Vested
INTC	10,000		10,000	\$0.00	\$59,700.00
YUM	10,000	3,334	6,666	\$29,005.80	\$57,994.20
Totals:	20,000	3,334	16,666	\$29,005.80	\$117,694.20

myStockOptions.com Advertising

Channel: Quick-Take Calculator

A 250 x 250 advertisement under the results section of the Quick-Take Stock Options Calculator will reach participants at the point when they are considering what to do with future gains.

The screenshot shows the myStockOptions.com website in a Windows Internet Explorer browser. The page title is "myStockOptions.com - Quick Take Calculator for Stock Options". The URL is "https://www.mystockoptions.com/calculator/index.cfm". The page features a navigation menu with links for "MYRECORDS", "MYTOOLS", "MYLIBRARY", and "MYCLIENTS". A search bar is located at the top left. The main content area is titled "Quick-Take Calculator for Stock Options" and includes a "Select Your Grant Data" section with tabs for "View Grant Totals" and "View Individual Grants". The "View Grant Totals" tab is active, showing input fields for "Company Stock Symbol" (DTAS), "Total Option Shares" (Exercisable, 0), "Exercise Price" (\$), and "Company Stock Price" (\$0.86). A "Calculate" button is present. Below this is a "What if Company Stock Price" section with a dropdown for "Increases" and a "Recalculate" button. A "Tax Rates" table is also visible, listing rates for Fed (25%), Soc (6.20%), Med (1.45%), and MA (5.30%). The "Results" section on the right shows a "Gain" table with "Pre-Tax Gain" of \$0.00, "Less Total Tax" of (\$0.00), and "Net Proceeds" of \$0.00. A large orange box with the text "250 x 250" is overlaid on the results section, indicating the location of the advertisement. The page footer contains "Calculator Instructions" and a "LOG OUT" button.

Tax Rates	
Fed:	25%
Soc:	6.20%
Med:	1.45%
MA:	5.30%

Gain	
Pre-Tax Gain	\$0.00
Less Total Tax	(\$0.00)
Net Proceeds	\$0.00

myStockOptions.com Advertising

Channel: Content Sections

120 x 240 advertisement on left column of landing pages, articles, and FAQs.

Our content is normally available to free or premium registrants, and selected content is available without advertising.

We can open more individual articles to the unregistered visitor with advertisements stating that the special access is sponsored by the advertiser.



The screenshot shows the myStockOptions.com website interface. At the top, there is a search bar and navigation links for Tax Center, Global Tax, Newsletter, Glossary, Discussion, About Us, and Home. There are also buttons for SIGN IN and REGISTER. Below the navigation is a menu with categories: Basics, NQSOs, ISOs, ESPPs, Restricted Stock, SARs, Financial Planning, Job Events, Life Events, M&A, SEC Law, and Pre-IPO. The main content area is titled "Financial Planning" and includes a sub-section "Financial Planning" with a description: "Financial Planning explores various approaches to making the most of stock grant gains while minimizing taxes. The coverage includes the role of stock grants in [gifts](#), [estates and trusts](#), [dividends](#), [hedging](#), and more." Below this is a call to action: "Browse an overview of this section below, or explore the subtopics to the left." There is also a sidebar on the left with a list of subtopics: Strategies, Advanced Strategies, Diversification, High Net Worth, Estate Planning, Gifts, Dividends, and Year-End Planning. A large orange rectangle in the sidebar indicates a 120x240 advertisement placeholder. The main content area features a section titled "Articles" and "FAQs" with three articles listed: "How Tax Rate Changes Impact Your Stock Grant Strategies (Part 1): Nonqualified Stock Options", "How Tax Rate Changes Impact Your Stock Grant Strategies (Part 2): Restricted Stock", and "How Tax Rate Changes Impact Your Stock Grant Strategies (Part 3): Incentive Stock Options". Each article is authored by Stanley Trotta with Robert Gordon. There is also a small image of two people in a meeting and a call to action: "Develop a financial plan to build wealth from stock options and other grants."

myStockOptions.com Email Communications

1. Sponsorship of email newsletter, including an ad in the email for the newsletter and in the issue itself.

2. Stand-alone email for approved advertisers.

The screenshot shows the top portion of an email newsletter. At the top left is the logo 'myStockOptions.com' with a registered trademark symbol. To the right is a 'HOME PAGE' button. Below the logo is the subject line 'How To Avoid Costly Tax-Return Mistakes: myStockOptions.com Newsletter' and the date 'March 16, 2010'. A section titled 'IN THIS ISSUE' contains a bulleted list of four items, each preceded by a red arrow: 'How to avoid common tax-return mistakes with stock compensation', 'Articles on tax-return topics', 'Podcast and presentation on tax returns', and 'Selected updates in tax-related content'. Below this is a section header 'A STITCH IN TIME: AVOID TAX-RETURN ERRORS NOW TO PREVENT COSTLY IRS PENALTIES LATER'. The main body text discusses the importance of understanding tax and legal planning for stock compensation, mentioning the Internal Revenue Code and securities laws. It notes that timely avoidance of errors can prevent costly IRS penalties. A blue link 'Below' is provided for an FAQ. The footer of the newsletter includes a thank you message and contact information: 'We appreciate your interest in myStockOptions.com. If you do not yet subscribe to Premium or Pro Membership, giving full access to our content and tools, please contact us before April 1 to receive a \$25 discount on a one-year subscription. All of our content and tools are also available for licensing. We'd love to hear from you by phone (617-734-1979) or by email (editors@mystockoptions.com). Thank you.'

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