

## Compensation & Benefits Checklist

### Annual Income

- Base Salary
- Commissions
- Guarantee (1<sup>st</sup>/2<sup>nd</sup> years)
- Incentive Pay (bonus potential)
- Signing Bonus
- Compensation Review Schedule
- Cost of Living Differential

### Time Off

- Vacation Plan
- Personal and/or Sick Days
- Family Leave
- Military Reserve Policy

### Long Term Incentives

- Stock Options
  - Incentive Stock Options (ISO's)
  - Restricted Stock Options (RSO's)
- Stock grants/ restricted stock
- Employee Stock Ownership Plan (ESOP)
- Deferred Compensation
  - Profit Sharing (defined contribution plan)
  - Pension (defined benefit plan)
- Defined Contribution Plans (IRA, 401K plans, etc.)
- Supplemental Executive Retirement Plan (SERP)
- Non-Qualified Deferred Compensation (NQDC)

Considerations: company matching, vesting schedules, and guarantees or draws

### Healthcare/Insurance

- Major Medical –or- other type
- Health Insurance Plan (HMO, PPO, EPO, POS)
- Prescription Plan
- Dental Plan
- Vision Plan
- Life Insurance (family coverage?)
- Travel Insurance
- Disability (short-term / long term)
- Employee Assistance Program

### Relocation

- House-hunting Trip(s)
- Relocation Assistance
- Moving Assistance
- Additional shipping costs
- Sale/Purchase of Home Assistance
- Mortgage Bridge Loans
- Real Estate Brokerage Fee
- Prepayment Penalty Fees
- Temporary Lodging/Housing
- Spousal Job Support
- Incidental Lump Sum Payment

Considerations: reimbursement policies, lump-sum payouts, and tax gross-ups, and tax implications

### Other

- Automobile or Auto Reimbursement
- Day Care
- Dependent Scholarships
- Student Loan Payoff
- Tuition / Education Funds
- Discount Clubs (consumer goods)
- Education Match Gifts
- Equipment (Cell phone, tablet, PC, etc.)
- Legal Assistance
- Low Interest Loans
- Memberships (Clubs, Professional, etc.)
- Retirement, Estate or Financial Planning
- Tax Assistance / CPA Services

### Separation

- Employment Contract (senior management)
- Non-Competition Terms
- Deferred Compensation
- Severance Pay
- Outplacement Services
- Healthcare Continuation (post-retirement)
- Insurance Conversion Privileges