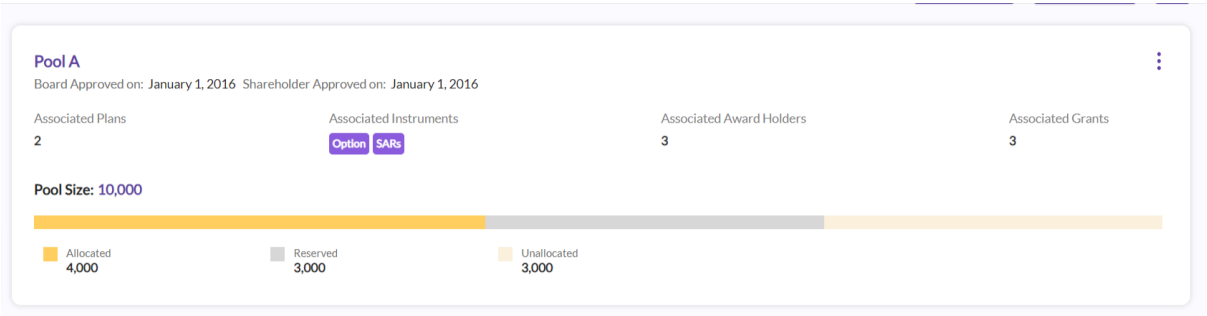# Shareholder Pool

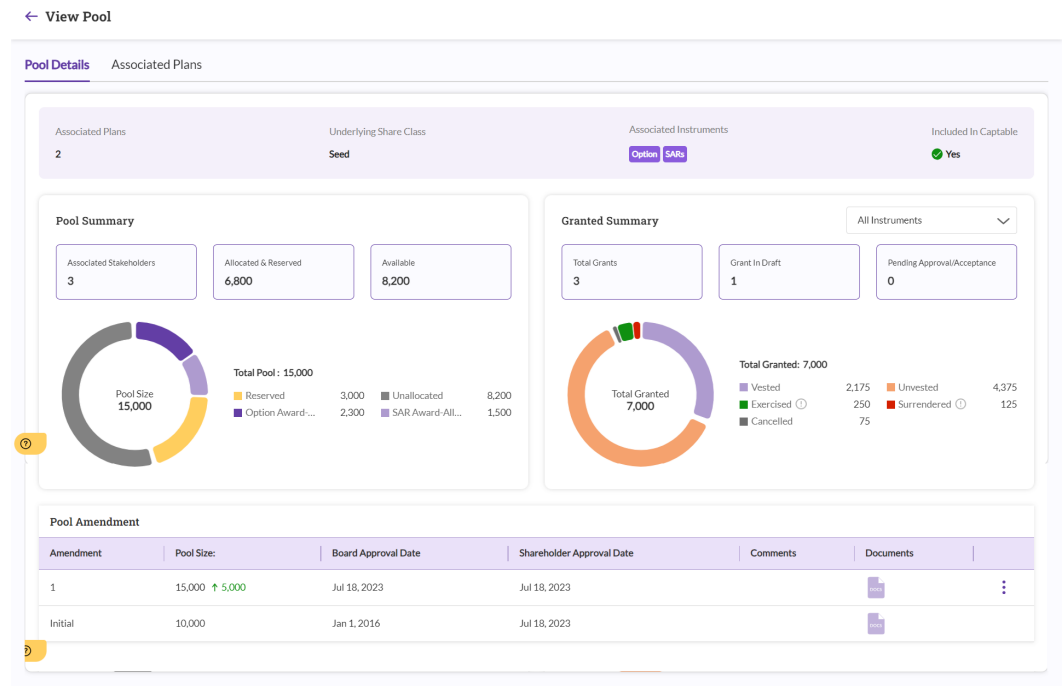Modified on: Tue, 1 Aug, 2023 at 10:02 AM

This feature allows user to create an equity pool, which can be associated to multiple plans. The purpose of the Shareholder Pool is to facilitate the creation and management of various types of instruments, including Option Awards, SAR Awards and Share Awards under a single pool. Here's a closure look at what this feature entails:

1. Equity Pool:

With the new shareholder pool feature, users can easily track and monitor the allocation of their pool. Users can now view the allocated and unallocated pool which is available for granting. Additionally, users can also separately track the reserved pool for grants in draft mode or grants that are pending for Approval or Acceptance.

2. Detailed Breakup of the Equity Pool:

The shareholder pool feature provides users with a comprehensive breakdown of their equity pool. Users can view the pool summary, granted summary (consolidated or based on their instrument selection), Amendments made to the pool, and the associated plans.

3. Summary and Detail for Plans:

← **View Pool**

Pool Details   **Associated Plans**

Grant Awards ▾   **+ Add Plan**

Option Award

Plan A
✓ Included in Captable   ⋮

Option Granted	Options Outstanding ⓘ
5,500	5,050
Number of Grants	Number of Holders
2	2

SARs Award

SAR Plan
✗ Not included in Captable   ⋮

SARs Granted	SARs Outstanding ⓘ
1,500	1,500
Number of Grants	Number of Holders
1	1

View Plan   ✕

| Type of Award | Number Of Holders | Total Awards | Included In Captable | |
| Option Award | 2 | 2 | ✓ Yes | **+ Create Option Award** |

Plan Summary

Total Granted
5,500

Total Award: 5,500

■ Vested	1,425	■ Surrendered	125
■ Unvested	3,625	■ Cancelled	75
■ Exercised	250	■ Lapsed	0
■ Settled	0		

Award Status

Total Awards
2

Total Award: 2

■ Accepted	1	■ Disapproved	0
■ In Draft	1	■ Terminated	0
■ Pending	0	■ Cancelled	0
■ Rejected	0		

Summary information and link to view detailed information for each plan provides a clear overview for users. This page provides a clear overview of the Equity plan, including the vested, unvested, exercised, surrendered, and cancelled portions. Furthermore, users can review the award status, such as the number of awards in the accepted, draft and rejected states. This information provides valuable insights into the current state of each plan associated with the shareholder pool.

For Existing Customers:

For existing customers, a pool will be created for every plan that was previously created on Qapita. For Instance, if an organization has three option plans and one SAR plan, the platform will create 4 Equity Pool accordingly. If desired, users can easily merge all their plans into a single pool by making edits on the platform.

This new feature enhances the functionality and convenience of managing equity pools and associated plans on the Qapita platform. Users can enjoy a more streamlined and comprehensive experience when it comes to tracking, allocating, and managing their equity holdings.