



# AUSTRALIAN SHARE PLAN REPORTING

## WE CAN HELP!

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### KEY TAKEAWAY

The deadlines for the Australian Share Plan Reports are approaching: the Employee Share Scheme Statements must be distributed to employees by July 14, 2020 and the Annual Report must be filed with the Australian Tax Office (ATO) by August 14, 2020.

### We Can Help

The Australian Taxation Office (ATO) has indicated that it does not intend to make any changes to the information required as part of the Australian Share Plan reporting process. We can assist you with meeting the deadlines using our specially designed upload tool.

Our Global Equity Services Practice can provide full-service support, comprised of:

- Calculations of the taxable amount, including for mobile employees;
- Produce Employee Share Scheme Statements for distribution to employees;
- Produce the ATO Annual Report and lodge with the ATO;
- Prepare standard communication to employees explaining ESS Statement; and
- Prepare individual calculation spreadsheet for each employee.

## For More Information



The deadlines for Australian Share Plan Reporting are approaching. The Australian Taxation Office (ATO) has indicated that it does not intend to make any changes to the information required as part of the Australian Share Plan reporting process. We can assist you with meeting the deadlines using our specially designed upload tool.

**Our Services**

- provide necessary calculations, including for taxable employees;
- produce Employee Share Scheme (ESS) Statements for you to distribute to employees;
- produce ATO Annual Report and help to lodge it with the ATO;
- provide standard communication to employees including ESS Statements; and
- provide individual calculation spreadsheet for each employee.

Our fee will vary depending on the number of employees, types of ESS interests and services required.

Employee ESS Statements due:  
**14 July 2020**

ATO ESS Annual Report due:  
**14 August 2020**



For more information on our services and pricing, see our **Australian Share Plan Reporting brochure**.

For specific questions regarding the Australian Share Plan reporting process, please contact your GES attorney.

## Contact Us



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