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WORLDWIDE WORK EXPERIENCE

TdS Advisory, LLC, Los Altos, California

July 2021 to Present

Manager and Owner – Independent Consultant

- Providing consulting services on communication programs (equity compensation and other financial benefits), compliance process development, training design, and project management. Supporting HR, stock, tax, and legal.

Amazon.com, Los Altos, California

March 2020 to June 2021

Communications Manager – Global Equity, 401(k), and Pension Programs

- Reporting under HR department at Amazon's Seattle headquarters, created, edited, and delivered communications to population of over 1 million corporate and fulfillment center employees worldwide.
- Drove awareness of financial benefits and program changes, leveraging UX design principles.
- Worked closely with US and global cross-functional stakeholders to define key business needs.
- Coordinated projects with third-party vendors to design, post, and mail both print and online communications.

TdS Advisory, LLC, Los Altos, California

April 2014 to March 2020

Manager and Owner – Independent Consultant

- Assisted multinational corporate clients in creating internal communications for employees and business partners, on global equity award topics. Created and delivered on-site employee trainings on clients' new stock programs.
- Designed and delivered engaging presentations at industry conferences, to elucidate changes in compensation laws.
- Developed concise videos for employee and business partner education using PowerPoint and Adobe CC tools.
- Assisted clients in analyzing risk and defining practical internal tax, legal, and payroll-related compliance processes, covering over 100 countries.
- Consulted on certain projects for ISP Advisors, Oct. 2010 - May 2012, and Apr. 2014 – Feb. 2019.

Cisco Systems, Inc., San Jose, California

May 2012 to March 2014

Manager - Global Stock Plan Services, International Compliance Team Lead

- Developed and edited communications explaining country-specific stock program changes, and complex compensation, tax, and legal concepts, for international employee population of over 75,000.
- Managed communications, queries, and HR cases for expatriate/mobile employee population of over 4,000.
- Created trainings for global payrolls and other business teams; trained HR call center staff on responses to queries.
- Coordinated information sharing amongst non-US jurisdictions and stock administration, legal, compensation, payroll, M&A, and business process teams. Managed EYSMS global income allocation program and vendor services.
- Monitored and managed securities, tax, and foreign exchange filings relating to the equity programs in 50 countries. Managed compliance of grant process, taxation, holding periods and systems, and country-specific requirements.

Stock & Option Solutions, San Jose, California

August 2007 to March 2010

Senior Consultant - Strategic Solutions Group

- Designed and delivered educational seminars (web-based and live) and created written communications (pamphlets, letters, FAQs, and presentations) to promote employee understanding of equity compensation programs.
- Edited client engagement letters for strategic solutions group and sales team.
- Trained client teams across all levels of management, on global compliance practices.
- Presented on equity plan management and the firm's services at industry conferences, including in Paris, France.

Ernst & Young LLP, San Jose, California

February 2001 to July 2007

Tax Manager - Human Capital / Performance & Reward

- Created employee communications, FAQs, prospectus supplements, and process maps to assist clients in managing equity compensation plans internationally.
- Advised multinational clients on tax compliance requirements related to stock options, RSUs, ESPPs, and other equity and deferred compensation programs in over 100 global jurisdictions.
- Drafted and updated web-based tax reports related to the offer of various equity vehicles in over 70 countries.
- Conducted due diligence analyses and recommended strategies to help clients achieve optimal tax treatment, and ensure regulatory compliance for global equity compensation programs. Performed SOX 404 review of client's stock administration processes, and recommended process improvements to improve operational efficiency.
- Prepared communications for US-based employees on the tax impact of IRC Section 409A and stock option backdating.

Credit Suisse First Boston, London, UK, and San Francisco, California

November 1998 to November 2000

Client Service Associate - International Equity Settlements

- Communicated legal and procedural information from international custody agents to settlements team, to increase department's market knowledge.
- Streamlined US client trade processing; created new reports to ensure receipt of US client instructions and timely settlement of equity trades.
- Managed timely settlement of equity transactions in French, Dutch, Austrian, Belgian, Swedish, Danish, Finnish, and Norwegian markets, through written and oral communication with affiliated agents and brokers.
- Assisted in set-up and expansion of the company's new European equities trade business.

Brokerages and HR consultancy firms, Moscow, Russia

July 1992 to September 1998

Various client support and consulting roles

LIFELONG LEARNING

Bachelor of Arts, International Politics and Economics, Middlebury College, Vermont

Associate of Arts, Graphic & Interactive Design, Foothill College, California

- *Digital Imaging Software I (Photoshop); Graphic Design Studio I, II & III (Adobe Illustrator, InDesign, Photoshop, Edge Animate); Website Design I & II (WordPress, Adobe Muse, basics of HTML5/CSS3); Illustration & Digital Imaging (Adobe Illustrator, Photoshop); Cartooning; Motion Graphics (basics of Adobe After Effects, Photoshop, Flash); Portfolio; History of Graphic Design; Typography; Drawing; Graphic Design Drawing; Intro to Photography*

Certificate in Instructional Design & Accessibility (In Progress), Foothill College, California

Other Coursework Completed:

- University of California Extension: *Managing the Staffing Function; Compensation Management; Benefits Management; Intermediate Accounting II; Auditing*
- Santa Clara University CAAP program: *Financial Accounting; Cost Accounting; Intermediate Accounting I*
- World at Work: *Principles of Executive Rewards*
- SJSU Masters in Taxation program: *Taxation of Executive Compensation; Tax Research & Decision Making*

Certified Equity Professional (CEP Level III), Leavey School of Business and Administration, Santa Clara University

Languages: English – Native; Russian – Elementary Proficiency