

# upstock

VISUAL EQUITY PLANS FOR TEAMS WORLDWIDE



**Casey Fenton, Founder**

<https://Upstock.io>  
casey@upstock.io  
427 N Tatnall St., #88152  
Wilmington, Delaware, 19801  
(415) 786-4546

Upstock makes it easier, less expensive, and more accessible to manage and issue equity around the world. We help businesses to get rid of equity headaches so that they no longer need to worry about the hassle of spending time with lawyers, long legal documents, and complex cap table management.

Our solution is better for both workers and employers. Now everyone can track equity and the value of that equity in an easy to use cloud dashboard.

Our solution is affordable and convenient. We want to make top shelf worker equity accessible to all businesses and startups. Whether you are working with employees, contractors, or advisers, Upstock has businesses covered.

Through our innovative legal framework, new technology and our unique equity algorithm, Upstock delivers value like never before. With Upstock, companies can see their equity in real-time, understand its true value, and use it to feel like they're truly a part of their team.

Top attorneys and global financial firms helped create and verify our legal processes to ensure international compliance. Upstock was built by a serial entrepreneur to solve his own issues with equity management and has been tested and used by many companies.

Businesses can easily sign up, enter a company valuation, create an equity pool, and manage their entire worker equity plan in as little as 30-minutes. No lawyers required. Without Upstock, companies lose a lot of time and money with over paid lawyers using old school technology, negatively impacting worker output and retention.

Upstock businesses are experiencing the joy of pain free equity management.

## FEATURES

- Personal dashboard for workers to track equity earnings.
- Administrative dashboard for admins to easily issue equity.
- Value splitting algorithm to calculate a fair division of equity.
- International coverage for 63 countries and growing.

#Fintech #SaaS #B2B

## LEGAL DOCUMENTS

- RSU plan
- Pool creation agreement
- Service provider agreement (workers, contractors, advisers)
- Equity award agreement

## TRUSTED BY

- Accelerprise, #1 B2B SaaS Accelerator
- Founders Fund, Top VC Firm
- Founder Space, Forbes #1 Accelerator

