

GECA Program Overview

As equity compensation becomes an increasingly important part of affluent client wealth, the need for practical, applied expertise continues to grow. **The Grantd Equity Certified Advisor (GECA)** program was created to help financial advisors build both the technical knowledge and hands-on skills needed for modern equity compensation planning using the Grantd platform.

The goal of this program is to prepare financial professionals not just to understand equity compensation, but to confidently integrate it into holistic financial plans, leveraging Grantd's advanced tools for modeling, analysis, and communication. This certification will equip advisors to unlock significant value for clients navigating complex equity landscapes, positioning them as indispensable experts in a rapidly evolving financial domain.

TARGET AUDIENCE

This program is ideal for experienced financial advisors, wealth managers, and financial planners who are working with clients or want to build a practice base of clients receiving equity compensation. It is particularly beneficial for those looking to deepen their expertise, differentiate their services, and effectively leverage technology in their practice.

Participants should possess:

- A foundational understanding of personal financial planning principles and investment strategies
- Experience working with clients in a financial advisory capacity
- Basic familiarity with financial terminology and concepts

WHAT YOU'LL LEARN

- 1 How to evaluate and plan around different types of equity compensation.
- 2 How equity compensation impacts taxes, liquidity, and long-term wealth planning.
- 3 How to guide clients through major equity-related decisions with confidence.
- 4 How to use Grantd's tools to model scenarios and communicate strategies clearly.
- 5 How to incorporate equity compensation into a holistic financial planning process.

PROGRAM STRUCTURE & FORMAT

The certification program is structured to help you build both conceptual understanding and practical application skills.

- Self-paced online learning so you can progress on your own schedule
- Interactive lessons and knowledge checks to reinforce key concepts
- Real-world case studies that reflect actual client scenarios
- Hands-on platform exercises to build proficiency using Grantd tools



PROGRAM LEARNING PATH

The program is organized into seven courses. Each course combines conceptual learning with practical application using the Grantd platform.

Grantd Equity Certified Advisor (GECA) Program Overview

Understand the certification journey and prepare for success from day one.

30 MINUTES

Equity Compensation Fundamentals

Master the core concepts, award types, and tax considerations that drive equity compensation planning.

1-2 HOURS

Advanced Equity Compensation Topics

Navigate complex planning opportunities involving taxes, timing, liquidity, and risk management.

2-3 HOURS

From Client Assessment to Actionable Strategy

Learn a repeatable process for evaluating client situations and developing actionable recommendations.

1-2 HOURS

The Grantd Platform Overview

Master the tools and workflows that power efficient equity compensation planning in Grantd.

1 HOUR

Applied Case Studies in Grantd

Apply your knowledge through realistic client scenarios and hands-on planning exercises.

2-3 HOURS

GECA Final Certification Exam

Validate your expertise to earn the Grantd Equity Certified Advisor (GECA) credential.

90 MINUTES

CERTIFICATION BENEFITS

Enhanced Credibility

Distinguish yourself as a certified specialist in equity compensation, boosting trust and authority with high net-worth clients.

Expanded Service Offerings

Confidently advise clients on complex equity strategies, opening doors to new client segments and revenue streams.

Operational Efficiency

Leverage the Grantd platform to streamline analysis, modeling, and reporting, freeing up time for client engagement.

Professional Network

Join an exclusive community of Grantd Equity Certified Advisors.

EARNING & MAINTAINING YOUR CERTIFICATION

To **earn** your GECA certification, you must complete the program and pass the final certification exam. Once certified, you'll be able to **showcase** your GECA credential on LinkedIn, social media, and in your professional email signature. To **maintain** your certification, you'll complete a short annual recertification that includes updates to equity compensation planning and the Grantd platform, plus a brief assessment to confirm continued proficiency.

