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 West Jordan, Utah

Kody Adams, CEP

DIRECTOR, STOCKHOLDER SERVICES

PROFILE

I have been working in the finance and compensation industry for over a decade. I have experience managing and designing global and domestic equity plans for both public and private companies. I prepare and deliver presentations to members of our Board of Directors and enjoy processing information in order to make the best decision(s) possible.

EXPERIENCE

DIRECTOR, STOCKHOLDER SERVICES

Domo | June 2020 – Present

- Oversee the administration of all company equity offerings
- Streamlined and documented department processes
- Assist with annual Proxy statement filing
- Complete SEC Filings (Forms 3, 4 & 5, 8-K, etc)

SENIOR STOCK PLAN ADMINISTRATOR

SoFi | Feb 2019 – June 2020

- Manage all aspects of the administration of SoFi's equity offerings
- Answer and address all equity related questions from employees
- Partner with HR, Legal, Payroll and Accounting to ensure efficiency and accuracy for all aspects of the plan

STOCK PLAN ADMINISTRATOR

Qualtrics | 2018 - 2019

- Manage day to day administration of all equity offerings and assisted with the management of our incentive compensation
- Designed company wide training for equity and insider trading
 - Created a domestic 423 compliant ESPP and similar plans for employees in nine other countries.
- Took Qualtrics to the doorstep of an IPO before we were acquired

EQUITY PLAN MANAGER

Sallie Mae Bank | 2016 - 2018

- Manage day to day administration of all equity offerings as well as oversee the execution of Sallie Mae's Incentive Compensation programs
- Assist with annual Proxy Report
- Oversee correct/prompt filings of SEC 16(b) Insider Reporting Forms
- Designed, built and delivered company wide training on equity

EDUCATION

BS, Business Administration
University of Alabama
2014-2016

AS, Economics
Salt Lake Community College
2013-2014

LICENSING

Certified Equity Professional (CEP)
Designation from Santa Clara
University

FINRA Series 7 (lapsed)

FINRA Series 63 (lapsed)

QUALIFICATIONS

Proficient in Microsoft Office including Excel, Word and PowerPoint

Very comfortable presenting in front of groups

Experience with the IPO process

Experience with financial reports and corporate balance sheets.