

SKILLS ID SUMMARY

Role: Stock Plan & HRIS Administrator
Location: Langhorne, PA
Manager: Director of Team Member Services

Company Description:

Customers Bank is one of the fastest growing banks in America that delivers on a vision from our Chairman Jay Sidhu to “Wow the Customer”, and The Team Member Services (TMS) Group helps every day to deliver on that vision. This is an excellent opportunity to join a high performing team that thrives in a fast-paced environment, showing a passion for the customer and producing superior results that positively impact and support the overall strategy of Customers Bank.

Role Summary:

Team Member Services (TMS) seeks an experienced stock plan professional to administer all aspects of the Company's annual and long term incentive equity grant programs, Employee Stock Purchase Plan, and key components of our HR Management System, Workday. This role requires close coordination with partners in Accounting, Finance, Legal and Payroll and collegial collaboration with other TMS functional areas, such as onboarding, training & development, employee communications & engagement, recruiting and benefits administration. This is a role for someone who craves a challenge, is committed to supporting the TMS Vision, Bank Culture and Strategy and driven to help the TMS Group exceed its goals.

Responsibilities:

- Equity Grant and Transaction Administration
 - Communicate new grants and other equity transactions to Accounting and collaborate with Accounting to ensure accurate participant data and grant agreements are updated as needed
 - Collaborate with Accounting to ensure accuracy of equity tracking through dual controls
 - Develop strong partnerships with Accounting, Finance, Legal and Payroll and the equity record keeper to address equity related matters.
 - Prepare and maintain applicable documentation of equity grants and equity related processes for external audits and compliance with internal controls.
 - Provide necessary data as requested for equity related disclosures for Proxy statements / required filings
 - Act as an equity administration liaison to participants, internal and external stakeholders, and respond to inquiries and requests regarding equity programs and grants
 - Provide reports and perform reconciliations to review accuracy of equity and transaction data.
- Restricted Stock Unit Vesting and Stock Option Exercises
 - Continuously maintain understanding of federal, state, and local taxes
 - Provide federal, state, and local tax rates for equity compensation (i.e., restricted stock units) to UBS
 - Maintain and update the tax code file containing Federal, State, and Local tax rates to UBS for each Team Member
 - Directly oversee the Participant file report and process that provides demographic and year-to-date salary/tax information to UBS
 - Directly oversee entering RSU Vesting and Options exercised information into the payroll system

- Employee Stock Purchase Plan (ESPP)
 - Develop and continuously refine the ESPP process
 - Directly oversee the payroll portion of the ESPP process including Eligibility, Enrollment, and Contributions
 - All Communications to Team Members
 - Main contact between CUBI, Payroll Agent (ADP, Workday) and UBS
 - Responsible for generating reports
- Workday Administration
 - Security Administration for Human Capital Management (HCM) functions
 - Business Process (workflow) Administration for HCM processes
 - Report Writing and Data Analytics for HCM data (provide reports upon request)
 - Workday communications and support to Team Members
 - Co-lead the Team Member Change processes (along with the Compensation Manager)
- Continuously maintain understanding of regulations, industry trends, current practices, and new developments as they pertain to ESPP, RSU Vesting, and Workday Human Capital Management
- Support Bank-wide TMS initiatives, special projects and other duties as assigned
- Assist with administrative functions to support the operational excellence of the department

Technology Strengths:

- Expert knowledge in HR related software to include UBS OneSource (brokerage interface), UBS Plan Admin Pro (system of record for ESPP and RSU), and Workday HCM
- Proficient knowledge in MS Office Word, PowerPoint, and Outlook
- Proficient to Expert knowledge of Excel

Must-Haves:

- Bachelor's Degree in Business or Human Resources or equivalent work experience
- 4+ years of equity administration experience at a US public company
- Minimum 2 years' experience with payroll entries
- Proficient knowledge of federal, state and local taxes including the tax treatment on equity compensation plans (RSUs / Options / ESPP)
- Excellent communication and presentation skills and the ability to work with individuals across all levels of the organization
- Strong drive for results, problem solving & conflict management abilities
- Strong ability to deal with ambiguity
- Good organizational & planning skills
- Ability to practice a high level of confidentiality
- Ferocious attention to detail
- Ability to identify and analyze problems; distinguish between relevant and irrelevant information
- Comfortable using technology
- Team-oriented with excellent listening, written and verbal communication skills
- Always show a passion for customer service
- Must be flexible and willing to do whatever it takes to get the job done and assist our customers

Customers Bank Culture:

At Customers Bank, we believe in working hard, working smart, working together to deliver memorable customer experiences and having fun. Our Vision, Mission, and Values guide us along our path to achieve excellence. Passion, attitude, creativity, integrity, alignment, and execution are cornerstones of our behaviors. They define who we are as an organization and as individuals. Everyone is encouraged to have personal development plans. By doing so, our Team Members are on their way to achieve their highest potential and be successful in their personal and professional lives.

Customers Bank will provide consideration for employment to qualified applicants without regard to their race, color, religion, national origin, sex/ gender, sexual orientation, gender identity, protected veteran status or disability.

