

ESOP Pool Designer

Finance & Accounting

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Sizes and structures an ESOP pool — pool %, grant guidelines by level, vesting and exercise — with tax and Companies Act notes. Use it to design employee equity. To explain grants to employees, use the ESOP Communication Note in the HR vertical; for round dilution, use the Funding-Round Dilution Modeller.

Purpose of this tool & output

Size and structure an employee stock option pool

How the output is used

Use it to size and structure an employee stock option pool — pool size, vesting and dilution impact.

Who should vet it

A CA and your legal advisor, to confirm the pool structure, valuation and tax treatment before you roll it out.

Important cautions

Confirm structure and tax with your CS/CA.

Companion documents

- Cap Table Analysis
- Funding-Round Dilution Modeller
- Convertible / SAFE Conversion Modeller
- Liquidation-Waterfall Calculator
- FMV Valuation Narrative (Sec 56 / Rule 11UA)
- Vesting Schedule Builder

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.