

About tracking employee stock plans

Many companies provide employee stock options as an incentive, a form of compensation, or both. When tracking employee stock options in Quicken, keep these points in mind:

- There are two types of employee stock options. ESPPs (employee stock purchase plans) allow you to purchase company stock at a discount, while ESOGs (employee stock option grants) are stock grants that don't require you to invest your own money.
- There are some special [tax considerations](#) for ESPP (employee stock purchase plan) shares.
- Before creating an employee stock option grant in Quicken, be sure to [set up a separate account to track your options](#).
- When you receive an ESOG (employee stock option grant), you generally can't exercise it right away (this is where the incentive comes in; the idea is that you'll stay with the company and share in its future success). The length of time you need to wait prior to exercising is called a [vesting schedule](#).

What can I do?

- [How do I enter an employee stock option grant \(ESOG\)?](#)
- [How do I exercise employee stock options?](#)
- [How do I reprice employee stock options?](#)
- [Edit an employee stock option grant](#)
- [How do I buy ESPP \(employee stock purchase plan\) shares?](#)
- [How do I sell ESPP \(employee stock purchase plan\) shares?](#)
- [Tell me about tax terms for ESPP \(employee stock purchase plan\) shares](#)

Special issues for corporate acquisitions and related transactions for ESPP (employee stock purchase plan) shares

Quicken does not support all transaction types for use with ESPP shares, because some transactions require cost basis in their calculations, and cost basis is not available for ESPP shares until you actually sell. To record one of the following transactions for ESPP shares, consult your employer for more information and then enter the values that your employer provides.

- [Record a corporate acquisition \(stock-for-stock\)](#)
- [Record a corporate spin-off of new securities](#)
- [Record a return of capital](#)