ExecAtlas

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People Business Intelligence

Data Feed Documentation

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The subsequent pages define each data feed file in greater detail. For further assistance, please contact:

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Equilar Data Services

Data Feed Documentation

Introduction

The Equilar Data Feed enables users to build applications incorporating an extensive data set of corporate board members and executives. Familiarity with Equilar's ExecAtlas services is helpful. The data feed provides a subset of the information provided through those platforms. This document also assumes familiarity with the programming language you will be using to obtain and parse the data.

This document defines the Equilar Data Feed for receiving information on individuals, organizations, and their auditors. Individuals possible to be returned are executives and board members at public, private, and non-profit organizations. The data set is global with a concentration on the United States.

Receiving the Data Feed

All data feeds will be in CSV (comma separated variable) format and delivered via SFTP, Google Cloud Storage or Snowflake.

All updates will contain the complete data set as per the agreement. Changes to "Person" and "Organization" data can be determined using the field "update_date". Any related data corresponding to these persons or organizations may have changed when "update_date" is modified.

Packages

The Equilar People Business Intelligence Data Feed is split into three packages and contains 12 files by default (People Business Intelligence). The remaining files are accessible through two supplemental add-ons (Equity & Compensation; Executive & Director Relationships). The table below details which files are included in each package.

	Data Sets		
	People Business Intelligence	Equity & Compensation	Executive & Director Relationships
File Name			
Person	✓		
Organization	✓		
Position	✓		
Position_Role	✓		
Committee	✓		
Person_Board_Detail	✓		
Bio	✓		
Education	✓		
Ethnicity	✓		
Auditor	✓		
Audit_Fee	✓		
Transition	✓		
Wealth_Summary		✓	
Executive_Comp		✓	
Director_Comp		✓	
Form_4_Transaction		✓	
Form_4_Vesting		✓	
Person_Connection			✓
Connection_Path			✓
Total Files	**12 files**	**5 files**	**2 files**

Field Relationships

The schema is centered around the person and organization tables. Almost every other table will have one or more columns containing a person_id or organization_id.
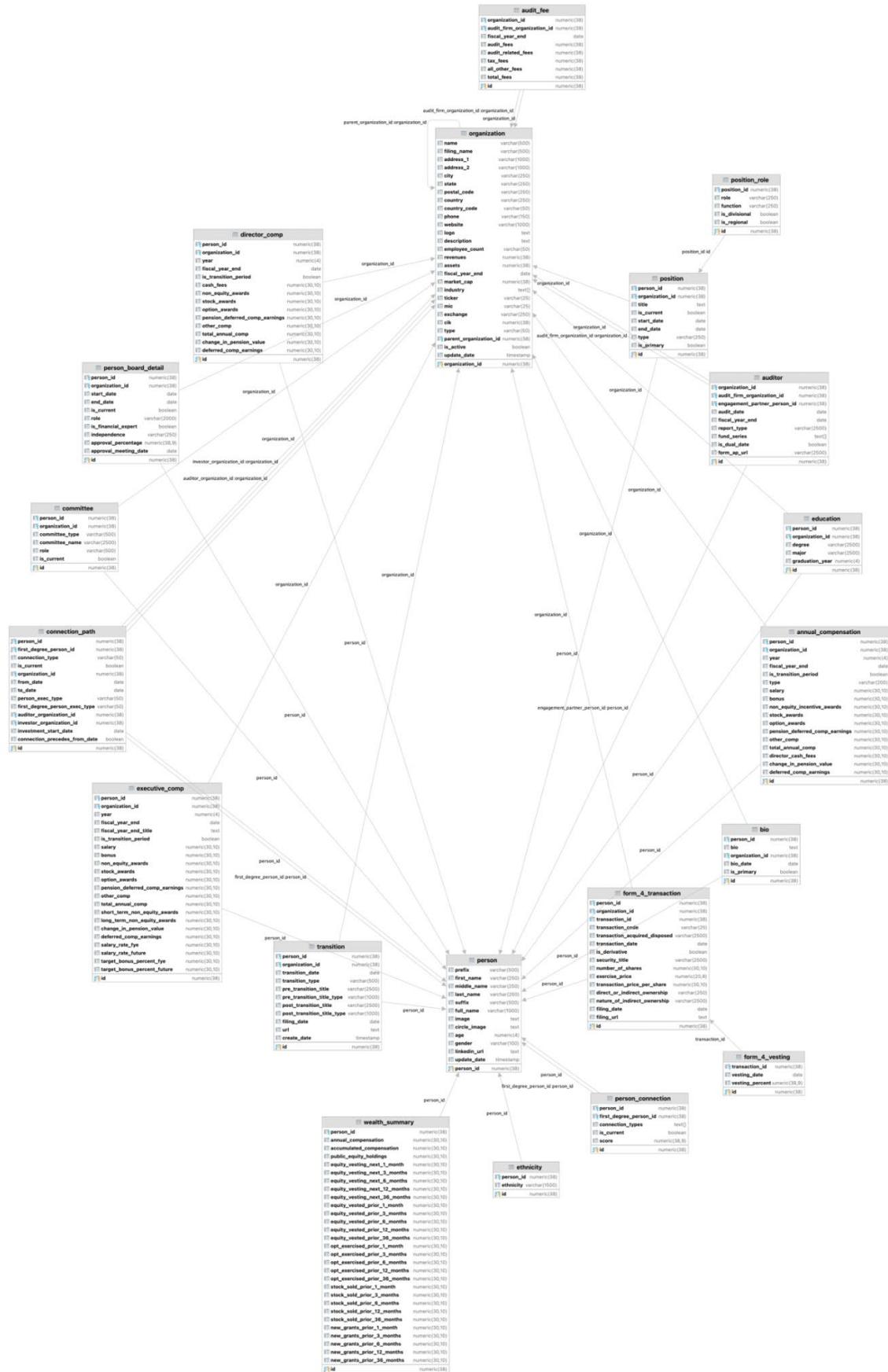
The below list represents common fields that can be used to link records together between files.

Primary Field	Foreign Relationship
person.person_id	position.person_id
person.person_id	committee.person_id
person.person_id	person_board_detail.person_id
person.person_id	bio.person_id
person.person_id	education.person_id
person.person_id	auditor.engagement_partner_person_id
person.person_id	transition.person_id
person.person_id	ethnicity.person_id
person.person_id	wealth_summary.person_id
person.person_id	executive_comp.person_id
person.person_id	director_comp.person_id
person.person_id	form_4_transaction.person_id
person.person_id	person_connection.person_id
person.person_id	person_connection.first_degree_person_id
person.person_id	connection_path.person_id
person.person_id	connection_path.first_degree_person_id
organization.organization_id	organization.parent_organization_id
organization.organization_id	position.organization_id
organization.organization_id	committee.organization_id
organization.organization_id	person_board_detail.organization_id
organization.organization_id	bio.organization_id
organization.organization_id	education.organization_id
organization.organization_id	auditor.organization_id
organization.organization_id	auditor.audit_firm_organization_id
organization.organization_id	audit_fee.organization_id
organization.organization_id	audit_fee.audit_firm_organization_id
organization.organization_id	transition.organization_id
organization.organization_id	executive_comp.organization_id
organization.organization_id	director_comp.organization_id

Primary Field	Foreign Relationship
organization.organization_id	form_4_transaction.organization_id
organization.organization_id	connection_path.organization_id
organization.organization_id	connection_path.auditor_organization_id
organization.organization_id	connection_path.investor_organization_id
position.id	position_role.position_id
form_4_transaction.transaction_id	form_4_vesting.transaction_id

The diagram on the next page illustrates the relationships visually. Zoom in to more clearly see the detail.

Figure 1: Entity-Relationships

File: Person

Description: Main file containing individual information. It Includes details like name, gender, and age for each person.

Field	Type	Example	Definition
person_id	integer	6058038	Unique Equilar person identifier
prefix	text	Dr.	English honorific
first_name	text	Arthur	Person's first name/given name
middle_name	text	D.	Person's middle name or middle initial
last_name	text	Levinson	Person's surname/family name
suffix	text	Ph.D.	Suffix component of a person's name
full_name	text	Dr. Arthur D. Levinson Ph.D.	Full name of the individual including all name pieces
image	text	https://static.equilar.com/prod/18475000/18475804_378472.png	URL link to a 115x160 image of the individual
circle_image	text	https://static.equilar.com/prod/18475000/18475804_378472_largeCircle.png	URL link to a 144x144 image of the individual, cropped in the shape of a circle
age	integer	68	Person's age in years
gender	text	Male	Person's gender
linkedin_url	text	linkedin.com/in/arthur-levinson-123	URL link to the person's LinkedIn profile
update_date	timestamp	2019-01-19 16:00:15	Timestamp for when the entity was last updated in our DB

File: Organization

Description: Main file containing organization information. Includes details for each organization like address, website URL, and logo.

Field	Type	Example	Definition
organization_id	integer	63	Unique Equilar organization identifier
name	text	Apple Inc.	Name of the organization
filing_name	text	APPLE INC	Filing name of the organization with the SEC

Field	Type	Example	Definition
address_1	text	One Apple Park Way	Street address of the organization's headquarters
address_2	text	Suite #1	Secondary field for street address
city	text	Cupertino	City of the organization's headquarters
state	text	California	State of the organization's headquarters
postal_code	text	95014	Postal code of the organization's headquarters
country	text	United States	Country of the organization's headquarters
country_code	text	US	Country of the organization's headquarters in ISO 3166-1 alpha-2 format
phone	text	(408) 996-1010	Organization's phone number
website	text	www.apple.com	Organization's website
logo	text	https://static.equilar.com/prod/0/64_223_logo.png	URL link to an image of the organization's logo
description	text	Apple Inc. designs, manufactures, and markets smartphones, personal computers, tablets, wearables, and accessories worldwide.	Text description for the organization's primary business
employee_count	text	10,000+	Numerical range representing the total number of individuals employed by the organization
revenues	biginteger	265595000000	Annual revenues of the organization at its most recent fiscal year end
assets	biginteger	365725000000	Assets of the organization at its most recent fiscal year end
fiscal_year_end	date	2018-09-30	Date marking the end of the organization's most recent full year accounting period

Field	Type	Example	Definition
market_cap	biginteger	877607913600	Total market capitalization of the organization if public
industry	array	["Electronics", "Technology - All"]	Industry classifications
ticker	text	AAPL	Ticker symbol for the organization if public
mic	text	XNGS	MIC code for the exchange the organization trades on if public
exchange	text	Nasdaq Global Select	Text description of the MIC code
cik	integer	320193	Central Index Key identifier for the organization if it files with the SEC
type	text	Public	Organization's ownership type (public, private, government, non-profit)
parent_organization_id	integer	123	Equilar identifier for the parent organization if the organization is a subsidiary
is_active	boolean	true	Indicator for whether the organization is currently still in operation
update_date	timestamp	2019-01-13 16:00:15	Timestamp for when the entity was last updated in our DB

File: Position

Description: Current and past employment history for an individual.

Field	Type	Example	Definition
id	biginteger	601243371	Unique identifier for the row
person_id	integer	6058038	Unique Equilar person identifier
organization_id	integer	63	Unique Equilar organization identifier
title	text	Chairman	Person's title at the organization
is_current	boolean	true	Indicator for whether the person still actively holds the position
start_date	date	2011-11-15	Date the position began
end_date	date		Date the position ended
type	text	BOARD MEMBER	Classification for the type of position (executive, board member, executive and board member, advisor, other)

Field	Type	Example	Definition
is_primary	boolean	false	Equilar identified primary display role. Indicates which position is the best one to display if a single position needs to be shown for an individual

File: Position_Role

Description: Normalized role level and function classifications for positions.

Field	Type	Example	Definition
type	text	36768597276 66855180	Unique identifier for the row
position_id	biginteger	601243371	Unique identifier for a row within the position file
role	text	Chairman of the Board	Normalized role level classification for the position
function	text	General Executive	Normalized function classification for the position
is_divisional	boolean	false	Indicator for whether the position is for a specific division of the organization
is_regional	boolean	false	Indicator for whether the position is for a specific region

File: Committee

Description: Committee memberships held by board members.

Field	Type	Example	Definition
id	biginteger	-46120950108 13945881	Unique identifier for the row
person_id	integer	6058038	Unique Equilar person identifier
organization_id	integer	63	Unique Equilar organization identifier
committee_type	text	Audit	Normalized category classification for the committee
committee_name	text	Audit and Finance Committee	Name for the committee if different from its classification
role	text	Member	Person's role within the committee
is_current	boolean	true	Indicator for whether the person still actively holds the role within the committee

File: Person_Board_Detail

Description: In-depth information pertaining to each of an individual's board memberships.

Field	Type	Example	Definition
id	biginteger	-4355565966904461544	Unique identifier for the row
person_id	integer	6058038	Unique Equilar person identifier
organization_id	integer	63	Unique Equilar organization identifier
start_date	date	2000-01-01	Date the person joined the board
end_date	date		Date the person left the board
is_current	boolean	true	Indicator for whether the person is still on the board
role	text	Chair	Person's role on the board, if current
is_financial_expert	boolean	true	Indicator for whether the person has been disclosed as a financial expert through SEC filings
independence	text	Outsider	Classification for how independent the person is from the organization (insider, affiliate, outsider)
approval_percentage	numeric	96.9716463	Approval percentage by shareholders the last time the person was up for election to the board
approval_meeting_date	date	2019-03-01	Date of the person's last shareholder election

File: Bio

Description: Biographies for an individual.

Field	Type	Example	Definition
id	biginteger	-5072042836999572632	Unique identifier for the row
person_id	integer	6058038	Unique Equilar person identifier

Field	Type	Example	Definition
bio	text	Art Levinson, 68, has served as the Chief Executive Officer of Calico, a company focused on health, aging, and well-being, since September 2013. Dr. Levinson previously served as Chief Executive Officer of Genentech, Inc., a medical drug developer, from July 1995 to April 2009, and served as Genentech's Chairman from September 1999 to September 2014. Among other qualifications, Dr. Levinson brings to the Board executive leadership experience, including his service as a chairman and chief executive officer of a large international public company, along with extensive financial expertise and brand marketing experience. Selected Directorships and Memberships Board of Directors, Broad Institute of Harvard and MIT Board of Scientific Consultants, Memorial Sloan Kettering Cancer Center Industrial Advisory Board, California Institute for Quantitative Biomedical Research Advisory Council, Lewis-Sigler Institute for Integrative Genomics Advisory Council, Princeton University Department of Molecular Biology Science Advisory Board, Chan Zuckerberg Initiative Former Public Company Directorships Within the Last Five Years Amyris, Inc. F. Hoffman-La Roche Ltd.	Person's biography
organization_id	integer	63	Unique Equilar organization identifier

Field	Type	Example	Definition
bio_date	date	2019-01-08	Date for when the biography was captured
is_primary	boolean	true	Equilar identified primary display biography. Indicates which biography is the best one to display if a single biography needs to be shown for an individual

File: Education

Description: Universities attended and degrees received for an individual.

Field	Type	Example	Definition
id	biginteger	-2392405405227305642	Unique identifier for the row
person_id	integer	6058038	Unique Equilar person identifier
organization_id	integer	68617	Unique Equilar organization identifier
degree	text	Ph.D.	Completed post secondary education degree
major	text	Biochemistry	Area of concentration for attained degree
graduation_year	integer	1977	Year a degree completed

File: Ethnicity

Description: A person's ethnic background.

Field	Type	Example	Definition
id	biginteger	5187292617221615856	Unique identifier for the row
person_id	integer	341680	Unique Equilar person identifier
ethnicity	text	Black / African American	Classification for the person's ethnicity

File: Auditor

Description: Auditors for an organization, sourced from Form AP filings.

Field	Type	Example	Definition
id	biginteger	554377163000 5200158	Unique identifier for the row
organization_id	integer	63	Unique Equilar organization identifier
audit_firm_ organization_id	integer	60585	Unique Equilar organization identifier for the audit firm.
engagement_partner_ person_id	integer	18898201	Unique Equilar person identifier for the person who performed the audit
audit_date	date	2018-11-05	Date the audit was completed
fiscal_year_end	date	2018-09-29	Fiscal year end for the year being audited
report_type	text	Issuer, other than Employee Benefit Plan or Investment Company	Classification for the audited entity
fund_series	array	[{"FundName": "BlackRock Income Trust, Inc.", "FundSeriesID": ""}]	Names of the funds audited if the audit is for an investment company
is_dual_date	boolean	false	Indicator for whether the audit report is dual dated
form_ap_url	text	https://pcaobus.org /resources/ auditorsearch /form-ap-filing? filingid=30979	URL link to the Form AP document

File: Audit_Fee

Description: Fees paid to auditors by an organization.

Field	Type	Example	Definition
id	biginteger	-6557903263 770975960	Unique identifier for the row
organization_id	integer	63	Unique Equilar organization identifier
audit_firm_ organization_id	integer	60585	Unique Equilar organization identifier for the audit firm
fiscal_year_end	date	2018-09-30	Fiscal year end for the year in which services were rendered
audit_fees	integer	17266600	Amount paid for audit services
audit_related_fees	integer	1008700	Amount paid for audit related services
tax_fees	integer	2306000	Amount paid for tax services
all_other_fees	integer	107500	Amount paid for all other services
total_fees	integer	20688800	Total amount paid to the audit firm

File: Transition

Description: Executive and board employment changes.

Field	Type	Example	Definition
id	text	0d47b1d7-960c-4937-8a27-eaff420ec190	Unique identifier for the row
person_id	integer	20295894	Unique Equilar person identifier
organization_id	integer	63	Unique Equilar organization identifier
transition_date	date	2019-02-05	Date for when the transition took place
transition_type	text	Role Change	Classification for the type of transition (appointment, role change, resignation)
pre_transition_title	text	Vice President, People	Person's title prior to the transition
pre_transition_title_type	text	EXECUTIVE	Classification for the type of position (executive, board member, executive and board member, advisor, other)
post_transition_title	text	Senior Vice President, Retail and People	Person's title after the transition.
post_transition_title_type	text	EXECUTIVE	Classification for the type of position (executive, board member, executive and board member, advisor, other)
filing_date	date	2019-02-06	Date for the filing where the information was disclosed
url	text	http://sec.gov/Archives/edgar/data/320193/000032019319000026/A8-kfebruary2019252019.htm	URL link to where the information was disclosed
transition_source	text	FILING	Classification for the source of the transition information
create_date	timestamp	2019-02-06 10:09:09	Timestamp for when the transition record was first added or materially changed in our DB

File: Wealth_Summary

Description: Summary values representing a person's compensation and equity holdings at public companies.

Field	Type	Example	Definition
id	biginteger	19646583467 73501850	Unique identifier for the row
person_id	integer	7637	Unique Equilar person identifier
annual_compensation	numeric	15682219	Amount of compensation the person received during their most recent year as either a NEO (named executive officer) or board member
accumulated_ compensation	numeric	1129235338	Sum of annual compensation across all years for the person
public_equity_holdings	numeric	1025685811.79	Total value of the person's publicly-disclosed equity holdings
equity_vesting_next_1_ month	numeric	110000	Total value of equity awards for the person vesting within the next month
equity_vesting_next_3_ months	numeric	196466.28	Total value of equity awards for the person vesting within the next three months
equity_vesting_next_6_ months	numeric	196466.28	Total value of equity awards for the person vesting within the next six months
equity_vesting_ next_12_months	numeric	196466.28	Total value of equity awards for the person vesting within the next twelve months
equity_vesting_ next_36_months	numeric	1274581466.28	Total value of equity awards for the person vesting within the next thirty-six months
equity_vested_prior_1_ month	numeric	0	Total value of equity awards for the person vested over the last month
equity_vested_prior_3_ months	numeric	0	Total value of equity awards for the person vested over the last three months
equity_vested_prior_6_ months	numeric	0	Total value of equity awards for the person vested over the last six months
equity_vested_prior_12_ months	numeric	177694	Total value of equity awards for the person vested over the last twelve months

Field	Type	Example	Definition
equity_vested_ prior_36_months	numeric	601704.37	Total value of equity awards for the person vested over the last thirty-six months
opt_exercised_prior_1_ month	numeric	0	Total value of option awards for the person exercised over the last month
opt_exercised_prior_3_ months	numeric	0	Total value of option awards for the person exercised over the last three months
opt_exercised_prior_6_ months	numeric	1982580	Total value of option awards for the person exercised over the last six months
opt_exercised_prior_12_ months	numeric	1982580	Total value of option awards for the person exercised over the last twelve months
opt_exercised_ prior_36_months	numeric	1982580	Total value of option awards for the person exercised over the last thirty-six months
stock_sold_prior_1_ month	numeric	0	Total value of stock sold by the person over the last month
stock_sold_prior_3_ months	numeric	0	Total value of stock sold by the person over the last three months
stock_sold_prior_6_ months	numeric	1737400	Total value of stock sold by the person over the last six months
stock_sold_prior_12_ months	numeric	56490288.40	Total value of stock sold by the person over the last twelve months
stock_sold_prior_36_ months	numeric	157436904.14	Total value of stock sold by the person over the last thirty-six months
new_grants_prior_1_ month	numeric	0	Total value of new equity awards received by the person over the last month
new_grants_prior_3_ months	numeric	0	Total value of new equity awards received by the person over the last three months

Field	Type	Example	Definition
new_grants_prior_6_ months	numeric	0	Total value of new equity awards received by the person over the last six months
new_grants_prior_12_ months	numeric	175049.20	Total value of new equity awards received by the person over the last twelve months
new_grants_prior_36_ months	numeric	515106.27	Total value of new equity awards received by the person over the last thirty-six months

File: Executive_Comp

Description: Yearly compensation a person has received for employment at an organization.

Field	Type	Example	Definition
id	biginteger	-6306984346050804044	Unique identifier for the row
person_id	integer	7637	Unique Equilar person identifier
organization_id	integer	63	Unique Equilar organization identifier
year	integer	2018	Year in which the person received compensation
fiscal_year_end	date	2018-09-30	Fiscal year end for the year in which the person received compensation
fiscal_year_end_title	text	Chief Executive Officer and Director	Title held by the person at the organization at fiscal year end
is_transition_period	boolean	false	Indicator signaling whether the compensation is for a full fiscal year or a partial year transition period
salary	numeric	3000000	Salary received during the year
other_comp	numeric	682219	Bonus payments received during the year outside of an annual incentive plan
total_annual_comp	numeric	15682219	Salary received during the year
short_term_non_ equity_awards	numeric	12000000	Value of short-term non-equity incentive plan awards paid out during the year

Field	Type	Example	Definition
long_term_non_equity_awards	numeric	0	Value of long-term non-equity incentive plan awards paid out during the year
change_in_pension_value	numeric	0	Change in pension value during the year
deferred_comp_earnings	numeric	0	Value of earnings on deferred compensation from the year
salary_rate_fye	numeric	3000000	Person's salary rate at fiscal year end extrapolated to a full year
salary_rate_future	numeric	3000000	Person's disclosed salary rate for the next year
target_bonus_percent_fye	numeric	200	Person's target bonus at fiscal year end as a percentage of salary
target_bonus_percent_future	numeric	200	Person's disclosed target bonus for next year as a percentage of salary

File: Director_Comp

Description: Yearly compensation a person has received for service as a board member for an organization.

Field	Type	Example	Definition
id	biginteger	3563383275265383749	Unique identifier for the row
person_id	integer	7637	Unique Equilar person identifier
organization_id	integer	15266	Unique Equilar organization identifier
year	integer	2018	Year in which the person received compensation
fiscal_year_end	date	2018-05-31	Fiscal year end for the year in which the person received compensation
is_transition_period	boolean	false	Indicator signaling whether the compensation is for a full fiscal year or a partial year transition period
cash_fees	numeric	130000	Cash compensation earned specifically for service as a board member
non_equity_awards	numeric	0	Value of non-equity incentive plan awards paid out during the year

Field	Type	Example	Definition
stock_awards	numeric	165049	Value of stock or units awarded during the year
option_awards	numeric	0	Value of options or SARs awarded during the year
pension_deferred_comp_earnings	numeric	0	Value of change in pension and/or earnings on deferred compensation
other_comp	numeric	20000	Value of other forms of compensation received during the year
total_annual_comp	numeric	315049	Total value of compensation during the year
change_in_pension_value	numeric	0	Change in pension value during the year
deferred_comp_earnings	numeric	0	Value of earnings on deferred compensation from the year

File: Form_4_Transaction

Description: Changes in equity disclosed in Form 4 filings.

Field	Type	Example	Definition
id	biginteger	-3082606397569546446	Unique identifier for the row
person_id	integer	7637	Unique Equilar person identifier
organization_id	integer	15266	Unique Equilar organization identifier
transaction_id	integer	12679099	Identifier for the transaction
transaction_code	text	A	SEC code classifying the type of transaction
transaction_acquired_disposed	text	Acquired	Field denoting whether shares were acquired or disposed during the transaction
transaction_date	date	2019-09-19	Date for when the transaction occurred
is_derivative	boolean	false	Indicator signaling whether the underlying security is an equity derivative

Field	Type	Example	Definition
security_title	text	Class B Common Stock	Description of the security being transacted
number_of_shares	numeric	1996	Number of shares being transacted
exercise_price	numeric	0	Conversion or exercise price for a derivative security
transaction_price_per_share	numeric	0	Price of the security at the time of transaction
direct_or_indirect_ownership	text	Direct	Field denoting whether the person has direct or indirect ownership over the shares
nature_of_indirect_ownership	text	Family trust	Description of the indirect ownership
filing_date	date	2019-09-19	Date for the filing where the information was disclosed
filing_url	text	https://www.sec.gov/Archives/edgar/data/320187/000112760219028946/xslF345X03/form4.xml	URL link to the filing where the information was disclosed

File: Form_4_Vesting

Description: Vesting schedules for new grants disclosed in Form 4 filings.

Field	Type	Example	Definition
id	biginteger	3418803393761911387	Unique identifier for the row
transaction_id	integer	12679099	Identifier for the transaction
vesting_date	date	2020-09-19	Date the vesting is taking place
vesting_percent	numeric	100	Percentage of the overall award which is vesting on that date

File: Person_Connection

Description: A person's network of first degree connections.

Field	Type	Example	Definition
id	biginteger	64573607315 75030695	Unique identifier for the row
person_id	integer	7637	Unique Equilar person identifier
first_degree_person_id	integer	6058038	Unique Equilar person identifier for another individual the person is connected to
connection_types	array	["WORKHISTORY"]	Classification describing the type(s) of connection
is_current	boolean	true	Indicator denoting whether the two individuals are still active in their positions which led to the connection
score	numeric	82.2931	Calculated score between 0-100 denoting the strength of connection

File: Connection_Path

Description: Connection details between two individuals.

Field	Type	Example	Definition
id	biginteger	-7697221654432026172	Unique identifier for the row
person_id	integer	7637	Unique Equilar person identifier
first_degree_person_id	integer	6058038	Unique Equilar person identifier for another individual the person is connected to
connection_type	text	WORKHISTORY	Classification describing the type of connection
is_current	boolean	true	Indicator denoting whether the two individuals are still active in their positions which led to the connection
organization_id	integer	63	Organization identifier

Field	Type	Example	Definition
from_date	date	2011-08-24	Earliest confirmed date for when the two individuals began working together
to_date	date	2020-03-24	Most recent confirmed date for when the two individuals were working together
person_exec_type	text	EXECUTIVE AND BOARD MEMBER	Classification for the type of position (executive, board member, executive and board member, advisor, other)
first_degree_person_exec_type	text	BOARD MEMBER	Classification for the type of position (executive, board member, executive and board member, advisor, other)
auditor_organization_id	integer	123	Organization identifier for the audit firm
investor_organization_id	integer	123	Organization identifier for the firm providing the investment
investment_start_date	date	2000-01-01	Date the investment first took place
connection_precedes_from_date	boolean	true	Indicator signaling whether the connection first began prior to the confirmed from_date

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