Mitigate Risk & Deliver Value To Clients

**Periodic Reporting Preparation**

- Finding precedents & market standard language
- Reduce unbilled time spent searching
- Quickly find relevant precedents and SEC responses for preparing disclosures
- Inform your guidance to clients around strategy related to shareholder proposals
- Incorporate a global perspective around compliance precedents

**Risk factor & MD&A disclosures**

- Gather insights from filings for risk factors, MD&A and Notes to Financials
- Reduce the effort required to analyze specific disclosures
- Help clients mitigate the risk of regulatory scrutiny and potential litigation

**Precedents and market standards**

- Specify criteria for searching by peer group, market cap, industry, etc.
- “What’s Market” calculated by frequency of clauses that meet specified criteria

**Frequency of clauses that meet “What’s Market” calculated by**

- cap, industry, etc.
- Searches by peer group, market cap, industry, etc.
- Intuitive user interface to limit

**Connected content across SEC filings and exhibits, SEC Comment Letters, Interpretations and no-action letters**

**Research support from subject matter experts**

**Business Development**

**Targeting prospects & developing pitches**

- Identify prospects at target companies
- Uncover regulatory developments and risks to engage prospects and customers
- Benchmark the prospect’s disclosures to identify some quick wins
- Quickly identify similarities with the right target profile to build new business

**Related parties tagged and included in transactional summaries for streamlined review**

**Universal topic searching for peer companies across filings, agreements and exhibits, corporate governance documents, SEC Comment Letters, etc.**

**Compare tool automatically redlines your documents, SEC Comment Letters, etc.**

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**Responding to external events**

- Quickly develop valuable insights based on disclosures from a broad set of peer companies
- Advise clients on public disclosures in response to political and macro events (e.g., Brexit)
- Maintain awareness of relevant news reports, blogs and publications

**Incorporate a global perspective**

- Mitigate the risk of SEC Comment Letters and SEC Filings, SEC guidance and firm memos delivers a rich source of insights
- Breath of the content across SEC Filings, SEC Comment Letters, SEC guidance and firm memos delivers a rich source of insights
- Intuitive interface for searching across statutes, rules, regulations, etc.
- Securities Mosaic broadens your coverage to more than 53 different regulatory bodies
- Alerting to track when new SEC releases or firm memos/articles are published
- Securities Mosaic, Dodd-Frank and ACA readers position you to react to the most recent rule changes

**Contact Us To Learn More**

www.intelligize.com
info@intelligize.com
888-925-8627

**Professionals We Serve**

- Corporate Attorney
- M&A Attorney
- Securities Law Attorney
- Capital Markets Accountant
- Assurance Team
- Business Development Professional
- Research Professional

**Intelligize** a LexisNexis Company

**Compliance Research**

**Growing maze of rules & regulations**

- Stay on top of the latest regulatory changes and interpretive guidance from numerous governmental agencies and regulatory bodies
- Mitigate the risk of SEC Comment Letters for your clients
- Access expansive coverage of output from regulatory organizations
- Track the latest rulemaking initiatives that carry compliance implications

**Finding precedents & market standards**

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**Benchmarking & Peer Analysis**

**Disclosure benchmarking**

- Broaden the scope of benchmarking exercises to include more companies
- Effortless comparison of disclosure language to identify the market standard and track changes in disclosure approaches
- Mitigate risks by adopting language sourced from a wide universe
- Easily compare language by peer companies on specific disclosure topics

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**Content and advanced search tools to gather insights quickly across filings, SEC Comment Letters and guidance**

**Alerts based on topics, transaction types and keywords**

**Market standard models of corporate governance materials pulled from S&P 500 entities**

**Drafting agreements, exhibits & governance**

- Reduce the time spent drafting agreements, exhibits and governance documents
- Identify market standard clause language to support drafting
- Inform the drafting bibles, board charters, articles, codes of ethics and other governance materials

**Search for filing exhibits by number, title, type or using universal topic searching for specific terms**

**View underlying exhibits to see the standard language being used for different types of agreements**

**Access expansive coverage of**

- publications
- different regulatory bodies
- across statutes, rules, regulations, etc.
- Securities Mosaic delivers your coverage to more than 53 different regulatory bodies
- Alerting to track when new SEC releases or firm memos/articles are published
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**Over 50**

**Intelligize captures and categorizes Interpretative Guidance, SEC Comment Letters, no-action letters, and firm memos/articles**

**Intuitive interface for searching across statutes, rules, regulations, etc.**

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