

Maximize Efficiencies, Minimize Risks

Intelligize™

Intelligize™
a LexisNexis company



Cover Your Compliance Bases

In today's rapidly changing, complex securities market, it doesn't matter whether you work in a law firm, a corporation or somewhere else. Your challenges are the same—or at least very similar. What does matter is your ability to stay compliant, build stronger deals and agreements, and deliver value to your shareholders or clients. That's where Intelligize™ can play a vital role.

Our web-based platform enables you to more efficiently research, prepare, and draft SEC filings, corporate transactions, and material agreements. Through powerful searching, filtering, benchmarking, analyzing, and alerting capabilities, Intelligize helps cut down on the amount of time and uncertainty involved in meeting reporting requirements. So you can move through the SEC filing and review process faster and with greater confidence.



Spend Less Time Searching—and More Time Optimizing Your Disclosure Strategy

Sure, you can search for regulatory and disclosure content in lots of places. But where else can you find context to go with that content? Look no further than Intelligize, which pulls together and automatically links a broad set of SEC disclosure documents—from filings to comment letters and SEC interpretations to exhibits and beyond.

The Intelligize platform lets you quickly compare disclosure language by peer companies on specific topics to identify the market standard. Were they successful in their approach? Then simply adopt their language—there's no need to reinvent the wheel. You can also access all publicly disclosed SEC comments and linked response letters to identify issues that have drawn the attention of examiners, giving you clear insight into the evolving focus and regulatory stance of the SEC.

Company Filings



SEC Filings

Efficiently search and retrieve SEC filings, agreements and exhibits:

- Search by date filed, form type, accounting standard, company name, market cap, industry, form type and various other filters
- Easily identify if a filing has been amended or received SEC comments
- Quickly review redlined changes, and click on links to exhibits incorporated by reference through deep content tagging that delivers unmatched search flexibility and accuracy



Section Analysis & Trends

Efficiently benchmark and analyze key disclosures from various filings:

- Search clauses, sections and items extracted from filings and amendments such as 10-Ks, Proxies, S-1s and more
- Easily view 'like' items, thanks to a unique algorithm that normalizes clauses and groups results by categories
- Perform on point benchmarking to identify how industry peers and competitors report on key topics



Agreements & Other Exhibits

Prepare better quality documents by reflecting market standards:

- Access a vast collection of contracts and agreements pulled from SEC filings from 1994 to present
- Filter by number, title and more including the position and salary in an employee agreement
- Rapidly identify market standard clause language and review how others structured contracts of interest
- Search for agreements that contain specific clause titles or clause language

Law & SEC Interpretations



Regulatory Materials

Search a myriad of documents from the SEC and the Electronic Code of Federal Regulations:

- Access statutes, rules, regulations and other materials pertinent to US capital markets
- Easily find IC releases, administrative proceedings and other enforcement materials



Comment Letters

Gain insight into the evolving focus and regulatory stance of the SEC:

- Access all publicly disclosed SEC comments and linked response letters to identify issues that have drawn the attention of examiners
- Quickly view correspondence relevant to your research through letters broken into individual comments and responses—a time-saving feature you won't find anywhere else
- Search by SEC examiner, topic, the responding law firm, or numerous other filters



No-Action Letters

Hone in on relevant SEC staff opinion:

- Search using a number of different keywords or phrases such as shareholder proposals and reconsideration requests
- Filter by SEC position or divisions and sub-divisions within Corporate Finance, Investment Management, Trade and Markets and Office of the Chief Accountant

Transactional Information



Mergers & Acquisitions

Identify the salient points of an M&A deal:

- Search for transactions and deal terms using filters such as target, acquirer, transaction type, transaction size and more
- Limit your search to those transactions that have material agreements attached, and to those that have definitive agreements, to view only completed deals



Registered Offerings

Efficiently search all '33 Act and '34 Act offerings registered with the SEC from 2010 to present:

- More than 50 filter types help minimize 'false positives' so you get to the best and final set of answers for drafting and analyzing
- Search within the clause, paragraph, sub-clause, or phrase of various documents to locate sample language used in disclosures



Exempt Offerings

Expand your transactional reach by quickly capturing hard-to-find securities information:

- Memos and international prospectuses for unregistered offerings under Rule 144A, Regulation S, Regulation D, and several other exemptions
- Extracted from private and foreign offering documents so you can search by company/issuer, security type, exemption used and many other filters



Corporate & Firm Materials

Corporate Governance

Benchmark the latest market standards as they relate to governance:

- Search comprehensive governance and investor relations materials, including committee charters, codes of ethics and the composition of the board of directors
- Collected from public filings and company websites, including those listed on the S&P 500 and the Fortune 500



Firm Memos

See what your peers have to say:

- Review searchable memos and articles from more than 150 law firm, accounting firms and consulting firms
- Review analysis by industry experts to gain relevant insight around compliance strategies
- Use advanced filtering to quickly identify relevant memos by keyword, topic and firm type

Analyze data with greater efficiency

Searching—and finding—the right information gets you halfway to your goal. But what good does research do if you don't have the time or tools to analyze results? Intelligize takes you all the way through the information gathering process, with advanced analysis tools that deliver deep insights into filing and disclosure characteristics that would otherwise require extensive research effort.

Spend less time researching and more time gaining insight. Effectively mitigate risk. And make better decisions faster with Intelligize.

Some highlights:

- Proprietary technology and algorithms determine “What’s Market” by calculating frequency of disclosure topics in documents
- Visualization tools provide a graphical breakdown of topics commented on by each SEC examiner enabling more informed research
- Powerful redline capability lets you quickly compare amendments or SEC Comments made to previously searched filings
- Proprietary data tagging enables you to search almost 2,000 different sections and topics
- Unmatched benchmarking capabilities enable you to gain insight into how others in your industry are reporting on crucial disclosure topics
- Precise alerting capability brings your immediate attention to relevant disclosures from companies of interest



Support that never stops

Just because Intelligize is easy to use doesn't mean you won't need our help from time to time. Tap into deep expertise with our teams made up of knowledgeable subject matter experts:

Research Team

With extensive experience in researching SEC files, they're who you go to with questions or to ask for research support. There's no search challenge they can't solve for you.

Account Management and Knowledge Management Teams

Known for their expertise in training clients on research techniques, these teams conduct online or in-person training. You pick the subject areas, of course, so they can tailor the training to your specific needs.

Find Out More about Intelligize

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