

Mitigate Risk & Deliver Value To Clients

Periodic Reporting Preparation

Finding precedents & market standard language

Reduce unbillable 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

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

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

“What’s Market” calculated by frequency of clauses that meet specified criteria

Precedents and market standards from international filings

Research support from subject matter experts

Following SEC Comment Letter discussions

Demonstrate greater value add to clients in an aggressive enforcement environment

Determine how the SEC’s position is evolving and perform trends analysis

Track individual SEC Comment Letter threads with subsequent responses in the chain

Look across multiple companies and see how they have answered a specific question

SEC Comment Letters and responses between issuers and SEC examiners

Normalized content for search across SEC Comment Letters by topic and individual SEC examiners to analyze topics that they tend to raise

View graphical analysis around trends associated with SEC Comment Letter correspondences

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

Ranking of risk factors disclosed by companies

Risk factors categorized into 455 subjects

MD&A disclosures and Notes to Financials broken down into industry practice sub-sections

Searches at the subject and sub-section levels with a wide range of filters

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

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

Compare tool automatically redlines your language for a specific clause against multiple peer companies

Harness the power of Intelligize™ and Lexis® Securities Mosaic®, combined with our industry experts to optimize clients’ disclosure strategy, improve efficiency in searching and drafting, and deliver value to clients and prospects.

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 rainmakers with the right target profile to build new business

Related parties tagged and included in transactional summaries for streamlined review

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

Alerts based on topics, transaction types and keywords

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

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.

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 trackers position you to react to the most recent rule changes

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

Breadth of the content across SEC Filings, SEC Comment Letters, SEC guidance and firm memos delivers a rich source of insights

Break down and categorization of disclosures enables search by topics

Securities Mosaic News & Blogs provides access to critical capital markets intelligence

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 bylaws, board charters, articles, codes of ethics and other governance material

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

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

Professionals We Serve

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

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