

Maximize Efficiencies, Minimize Risks



Cover All Your Bases

In today's rapidly changing, complex 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, monitor competitors, and deliver value to your shareholders or clients.

That's where Intelligize® can play a vital role.

Intelligize pulls together and automatically links a broad set of SEC disclosure documents including Filings, Comment Letters, SEC Interpretations and Statutes with FASB Codifications, Updates or Proposals and AICPA, IFRS and PCAOB standards.

We're coupling our superior technology with a deep pool of market and business information—for Investor Relations, General Counsel, the C-suite and advisors—linking SEC materials with market activity, news, transcripts, ESG reports and peer analysis to uncover insight into business trending topics and events impacting your business and industries.

Add the Industry's most rigorous tagging of content and the leading filtering functionality, and you get unmatched flexibility and speed when running searches.



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

Sure, you can search for regulatory and disclosure content, accounting codes, updates and proposals and market news in lots of places. But there's nowhere else you can find context to go with that content. Only Intelligize pulls together and links a broad set of SEC disclosure documents, accounting standards and business information—from filings to comment letters and SEC interpretations to exhibits and beyond.

Everything you need is in one place. Intelligize connects and links:

- SEC disclosure documents
- Transactional information like M&A, Registered Offerings or Exempt Offerings
- LexisNexis News including negative news filter
- FASB Codifications, Updates or Proposals and AICPA, IFRS and PCAOB standards
- Earnings call transcripts and investor presentations
- Firm Memos from law, accounting, and consulting firms
- Corporate Governance documents
- Regulatory Materials containing the statutes, rules, regulations, and other materials pertinent to US capital markets
- Stock price and earnings estimates
- Analyst Reports
- News
- ESG Reports

Relevant Content at Your Fingertips

Company Information & Filings



Company Insights

Balance SEC materials with market activity, news and peer analysis to uncover insight into trending business topics and events impacting your company:

- Search SEC Filings, earnings call transcripts, news and corporate governance/presentations with a single click
- Build a more complete picture of your competitors
- Stay ahead of market development with trusted news, precise alerting and precedent disclosures
- Streamline research around the numbers for competitors
- Improve the quality of preparation for earnings calls or one-on-one meetings with investors
- Customize your home screen for immediate access to economic, political and regulatory information and trends important to you



SEC Filings

Efficiently search and retrieve SEC filings, agreements and exhibits:

- Search by date filed, form type, accounting standard, company name, market cap, industry, 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
- Drill down to a specific financial table—Balance Sheet, Income Statement and Statement of Cash Flows—in 10-Ks and 10-Qs. But it's more than just that—we've normalized the terms for each component to simplify and streamline your searches



Disclosure Benchmarking (formerly 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
- Quickly compare risk factors across peer companies via Risk Factor Matrix
- Highlight the most important information with customized analytics
- 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
- Expedite the review of associated material contracts and agreements by following embedded links via Smart Cross Reference in agreement sections, or hover over links to display text from the section

Relevant Content at Your Fingertips

Law & SEC Interpretations



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 timesaving feature you won't find anywhere else
- Use our machine-learning-driven similar comments functionality to locate comments like one you received or found in search results
- Gain a high-level understanding of the landscape by exploring analytics on the home screen, or create customized analytics based on your own search
- Search by SEC examiner, topic, the responding law firm, or numerous other filters



Securities Regulation & Compliance

Keep up-to-date with the regulatory landscape

- Monitor SEC rulemaking, news and public statements, and staff interpretations with our dashboard views
- Search a curated collection of statutes, regulations, and SEC administrative material pertinent to US capital markets
- Leverage checklists to easily draft 10-K, 10-Q, S-1, S-3 and 8-K filings by connecting the SEC Forms with relevant regulations, SEC Filings, and Comment Letters



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
- Use analytics, like most-cited letters, that make it faster and easier to find relevant topics



Accounting Standards & Guidance

Efficiently connect accounting standards with related SEC Regulations and Guidance, Accounting and Law Firm Guidance and the latest SEC disclosures:

- Get a single view across FASB, PCAOB, AICPA or IFRS standards
- Track rule changes
- Research and benchmark market standard language for disclosures
- Understand how new accounting standards impact financial reporting
- Save time using US GAAP disclosure, Interim Financial Disclosure, 10-K and 10-Q checklists
- Discover precedent disclosure language for new business areas
- Collaborate on accounting policies and disclosure language
- Identify what's trending in relation to rule updates and proposals

Relevant Content at Your Fingertips

Transactions



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



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
- Get a bird's eye view of capital markets activity via homepage analytics



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

Corporate & Firm Materials



Environmental, Social & Governance

Stay ahead of upcoming developments and the latest disclosures in the ESG space

- Search ESG ranking/rating, topic trends, disclosure trends, frameworks used, ESG to stock price trends, reports, policies and filings
- Build a story that reflects your organizations commitment to ESG



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 firms, 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 and market information that would otherwise require extensive research effort.

Spend less time researching and more time gaining insight. Effectively monitor competitors and see regulatory trends to mitigate risk. And make better decisions faster with Intelligize.

Some highlights:

- Unique connected content links directly to relevant documents, news and filings
- Proprietary technology and algorithms determine "What's Market" by calculating frequency of disclosure topics in documents
- Visualization tools provide both high-level overviews and detailed graphical breakdowns of topics
- One-click Peer Search lets you extract peers from a company's proxy and can be edited and saved as customized lists
- 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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