

COULD YOUR CORPORATE
GOVERNANCE PROCESS
USE AN **OVERHAUL?**



Entity Relationship Management

REQUEST A DEMO TODAY.
800.966.1639

Entity Relationship Management - from Formation to Taxation

The constantly changing regulatory environment coupled with the growing requirements of internal governance makes doing business more and more complex. Today's realities and tomorrow's challenges require a backbone governance system that can manage the entire **ENTITY LIFECYCLE** from formation to taxation. Did you know that Corptax ERM integrates with your existing workflow and data management processes through a single system of record? Today, 90% of the Fortune 500 companies use Corptax solutions to manage critical entity information to stay compliant with global regulatory requirements.

Business Areas Addressed:

- Corporate Secretary
- Legal
- Corporate Governance
- Finance
- Tax

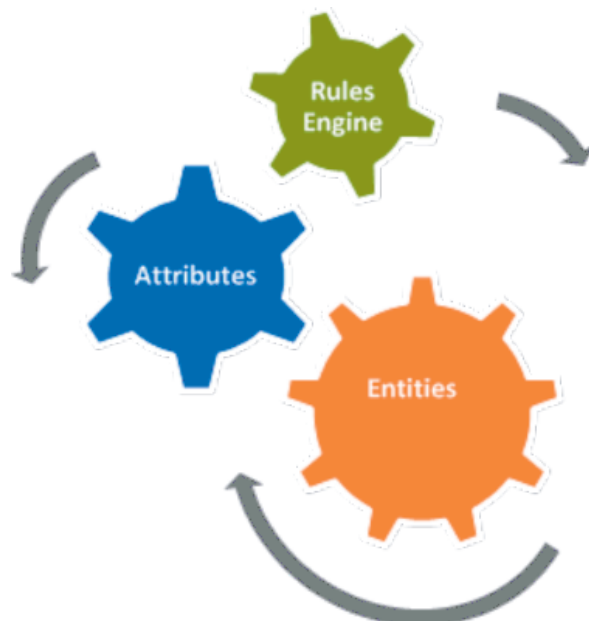
Key Features and Processes

- Entity formation
- Entity change management
- Compliance filing automation (entity annual reports, business licenses, company house filings)
- Board of Directory meetings and documentation
- Critical Entity Information (organization, tax, directors)
- Process workflow and approval
- Audit trail and tracking
- Document management



Corptax Entity Relationship Management offers a common system of record: an up-to-the-minute, standardized and automated, central database of all your vital structural information. It's all at your fingertips, providing you with:

- A common platform for acquiring and managing data across multiple departments
- The ability to manage multiple reporting structures based on conventional (e.g., legal, reporting, jurisdiction) and custom attributes. All changes are tracked in detailed audit trail by effective date for true multiyear reporting
- Current information on ownership and other data to readily meet compliance and regulatory requirements
- Visual organizational charts
- The ability to plan for the future and test for what-if scenarios
- Reduction in risk, error and manual duties



Corptax Entity Relationship Management is a solution that enables your corporation to not only manage critical organizational information, but also play a strategic role in business decisions. Advantages include:

- Real time data. Easily retrieve evolving records that are up-to-date at any given moment
- Multifunctional processes. Full workflow processes boost activity and analysis
- Customized and convenient access. Web-based application allows for ease of use and self-service access to all departments that provide or consume this information
- Highly secure network. Role-based user access provides the highest levels of network

Outcomes:

Annual Reports
Business Licenses
Certificates of Good Standing
Legal Organizations Charts
Structure Books
Calendar and Workflow
and beyond

INCREASED EFFICIENCY

DASHBOARD VIEWS

RULES DRIVEN WORKFLOW

ACCESS TO DOCUMENTS

ONLINE COLLABORATION

AWARD WINNING SUPPORT CENTER

SINGLE SYSTEM

ALL DATA IN ONE PLACE

TRAINING CENTER

PROFESSIONAL SERVICES

HIGHLY SECURE NETWORK

CUSTOMIZED & CONVENIENT ACCESS

COMMON SYSTEM OF RECORD

PROCESS WORKFLOW AND APPROVAL

AUDIT TRAIL AND TRACKING

DOCUMENT MANAGEMENT