

Questions to consider

Choosing an Escrow & Paying Agent

Whether your transactions are simple or complex, you need an escrow and paying agent you can trust to support your needs and provide safekeeping for your most valuable assets. You need to be confident that your provider understands your priorities and will get your deal done efficiently and on time.

The next time you need help with an important deal, consider these six questions when choosing an escrow and paying agent.

1 On-Time Funds Disbursement

Can the escrow and paying agent ensure on-time funds disbursement for all of your transactions?

At Computershare Corporate Trust...

We serve as both escrow and paying agent, relieving you of the burden of managing multiple large payments as well as having to coordinate with multiple vendors. Our paying agent portal provides shareholders with a seamless process for receiving proceeds and providing any acknowledgments required by your deal terms. We have completed 609 public and private M&A transactions¹ and have processed \$188 billion in distributed entitlements.¹



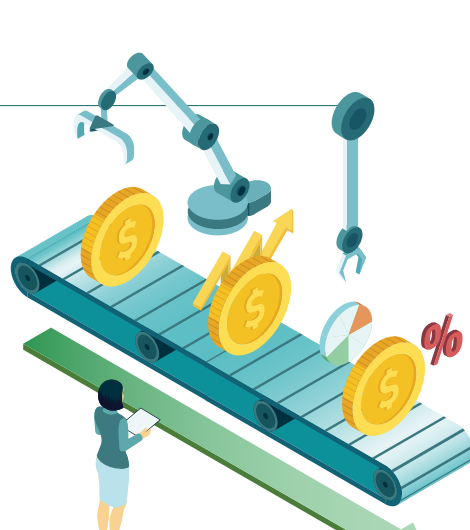
Escrow agents are often called upon to make large distributions to multiple recipients, often hundreds at a time in the case of mergers and acquisitions. This requires timely verification of contractual fulfillments and the coordination of financial transfers under tight deadlines.

2 Streamlined Know Your Customer (KYC) Process

Can the escrow and paying agent streamline the KYC process?

At Computershare Corporate Trust...

Our business negotiations team is nimble and efficient in this regard, which can potentially allow for time savings and faster turn-around on the agreement.



A dedicated KYC team can act faster with full control over the process, as opposed to one that relies on a shared services team elsewhere in the organization.

3 Quick Account Setup

Can the escrow and paying agent ensure quick account setup to meet your transaction deadlines?

At Computershare Corporate Trust...

We assign a dedicated deal team to each transaction, including a document negotiator and account administrator to ensure a quick account opening process, helping you meet your financial objectives.



In addition to completing the KYC process, onboarding teams must coordinate closely with business negotiation teams to ensure all documents are available to complete account setup.

4 Compliance Reporting for Stakeholders

Does the escrow and paying agent provide comprehensive reporting to ensure stakeholders that the deal is properly moving forward?

At Computershare Corporate Trust...

We provide real-time reporting to keep stakeholders informed of payment status, compliance status, and tax verification. We provide transparency to ensure you that your deal is moving forward on time.



An escrow and paying agent must maintain detailed records for receiving and processing large volumes of transactional documents and financial disbursements.

5 Investment Optimization

Does the escrow agent offer diverse investment options for balances held in escrow?

At Computershare Corporate Trust...

Our global banking model offers a wider array of interest bearing and non-interest bearing deposit options through our global network of approximately 20 different banking partners, which can help diversify your deposit risk. We manage USD \$342.7 billion in assets under administration.²



An escrow agent with a broad banking network can offer clients customizable investment options tailored to their investment preferences as well as minimum credit rating and liquidity requirements.

6 Cross-Border Capabilities

Is the escrow and paying agent able to transact in foreign currencies and in multiple jurisdictions?

At Computershare Corporate Trust...

We can hold and distribute your escrow funds directly in foreign currencies, with support in your local time zone. Through our affiliate global partners, we can facilitate foreign currency payments and set up your escrow with a U.S. partner.



Regional banks that lack global affiliate partners may have to set up your escrow with a separate international division.

7 Independent & Conflict-Free

Is the escrow agent a neutral third-party to all parties involved or are they linked to one of them?

At Computershare Corporate Trust...

Our third-party status ensures that we are always in a position to prioritize and protect our clients' interests.



The administration of an escrow agreement requires the guidance of an independent third-party that can ensure all terms and conditions are met to the satisfaction of all parties.

How well does Computershare check the boxes?

computershare.com/corporatetrust

We encourage you to ask these same questions to the Computershare Corporate Trust team. Visit our website and contact our team online, or reach out to your local Computershare contact.

Some of the Experts You'll be Working With



Orlando Jones

Business Development

"With over 15 years of experience in corporate trust, I'm excited to be supporting clients with business escrow, M&A and paying agent transactions. In addition to making the client onboarding and deal setup process easy for clients, I help navigate the entire deal lifecycle as a trusted and knowledgeable resource who is always available."



Matthew Sherman

Vice President, Business Negotiations

"The most rewarding part about negotiating escrow agreements for our clients is getting to learn about a wide variety of industries—every day is different and you never know what type of transaction you'll encounter. With twenty-seven years of experience in the corporate trust industry, I'm able to proactively identify potential roadblocks before they arise and effectively navigate through them. I'm excited to be part of the Computershare team as we help our clients close their important transactions when time is of the essence."

As part of the Computershare family, we are partnered with the largest global transfer agent providing advisory services, communications and technology solutions to many of the world's leading companies. Our team of seasoned escrow professionals keeps our contract revisions limited and the process simple, so that you can close your deal quickly and accurately.