

SAVE TIME. REDUCE COSTS. MINIMIZE RISKS.

How much time do you spend scrubbing shareholder data files to match them up with the multiple proxy tabulation/disclosure forms you have to submit? Hours? Days? WEEKS?!?

Proxy tabulation/disclosure forms come in all shapes and sizes. And the shareholder data files from your vendors do not always fit so easily into the format of those forms. Making it all work can involve manual processes that take a lot of time, cost a fair bit of money, and open your company up to greater regulatory risk due to human error.

There is a better way.

Our Professional Services Group (PSG) can take this entire process on for you. Our experts will develop an automated process to convert your data files to the proper format that will save you time, reduce your costs and minimize your regulatory risks.

The process is as easy as can be:

1. You'll meet with our experts first to work through the parameters of how to take your shareholder files and prepare them for your proxy tabulation/disclosure forms.
2. We then develop an automated program to scrub through the data, identifying and placing each data element in the appropriate field (name, address, etc.)

3. We thoroughly test the program to ensure its efficacy.
4. At the start of each proxy season, you transmit your shareholder data files to us via one of our secure data transmission channels (Issuer Online, HTTPS, FTP or sFTP).
5. Our experts will run your data files through the program we've created.
6. You receive back a fully scrubbed file, formatted properly for your proxy tabulation/disclosure forms.
7. You also receive a database of all the edits performed, so you can track the final formatted data set back to the original data set.

Formatting shareholder data files for proxy tabulation/disclosure forms may be a requirement, but it no longer needs to take up so much of your time. Hand off this labor-intensive, manual task to our experts, and get back the time you need to focus on the strategic aspects of your work.

Contact us at psg@computershare.com or visit us at computershare.com/psg for more information.



Outsourcing shareholder data file conversion for proxy tabulation/disclosure forms can save you time, reduce costs and minimize regulatory risks