



CUSTODYWARE

CustodyWare equips registered U.S. transfer agents with next gen. cap table management software to manage securities on behalf of their clients pursuant to an SEC-registered or exempt securities offering.

Integrate into your existing transfer agent technology or as a standalone hosted web portal

- Streamline all major transfer agent functions including issuance, transfer, query, reporting, affiliates, and release
- Built-in KYC/AML compliance checks on investors with an audit trail that checks have been performed

Expand transfer agent services to support quickly growing exempt securities marketplace

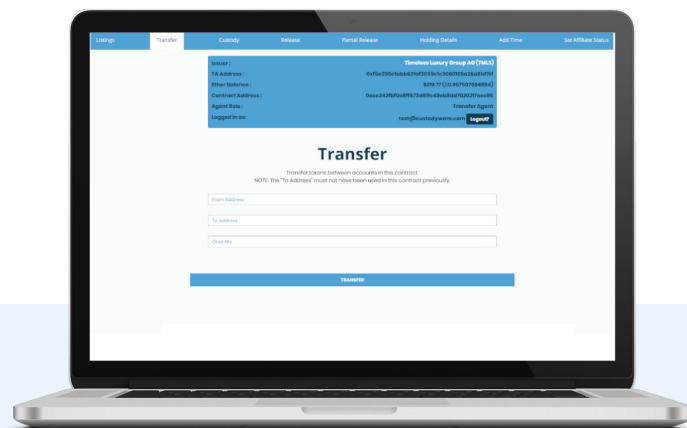
- Support the influx of new Reg A+, Reg D, & Reg CF issuers conducting exempt securities offerings
- Offer secure management of securities offerings and streamline release of securities to secondary trading

Maintain extensive reports and up-to-date shareholder listings

- Combine anonymized data with securely stored personal information to generate compliant, accurate shareholder reports
- Reduce duplication and ensure safe, transparent management of assets

Keep up with increasing compliance demands with built-in protections

- Programmed compliance for restricted securities, Rule 144, affiliate management, etc.
- Timestamped transaction records on tamper-proof media for issuer and investor protection



Dividend payment tools



Logged transactions on immutable storage medium



Simplified ATS-transfers



Annual reports & proxy statements



Up-to-date shareholder reports and listings



Transfer agent DRS Platform

HOW WILL YOU SUPPORT THE NEW WAVE OF CAPITAL FORMATION?

GET STARTED TODAY

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www.custodyware.com