

Here is what you should keep in mind when researching entity management solutions:

1



### Security

Does the service provider deliver top-level security to protect sensitive information?

2



### Integration

Does the solution offer real-time integration with core registered agent entity data and filings, secretary of state statuses, and provide the ability to integrate with third-party systems?

3



### Global Capabilities

Does the solution have flexibility when tracking both U.S. and international entities?

4



### Automation

Does the entity management solution streamline your workflows to run reports, create organizational charts, and give you the ability to locate documents?

5



### Collaboration

Does the solution allow for easy collaboration across departments?

6



### Support and Expertise

Does the service provider offer hands-on help during the implementation process and ongoing support from entity management experts?

7



### Getting Started

What assistance is available to help with entering data and documents?

8



### Flexibility and Customization

Are you able to customize the solution to meet the needs of your organization?

9



### Roadmap

What enhancements have been added in the last one to two years, and what upgrades are on the horizon?

10



### Cost

Does the service provider charge for number of users, modules, updates, training, and support?