

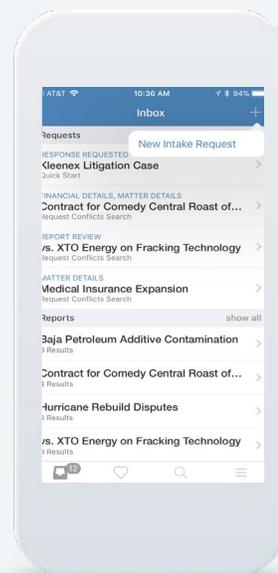


DATA SHEET

Dedicated Solutions for the Trust and Corporate Services Industry

Intapp solutions for privacy, compliance, and firm automation

The Trust and Corporate Service (T&CS) industry, once a fragmented group of small, local offices often spun out of law firms or accounting firms, is rapidly becoming professionalised, digitised, and highly regulated. In recent years, the industry has undergone major consolidation as private equity (PE) funds have sensed a large opportunity and entered with enthusiasm.



Largely based in select locations including Luxembourg, the Cayman Islands, the Channel Islands, Hong Kong and Singapore, these firms focus on setup, operational management and liquidation of legal entities for corporate, fund and private clients. Bain & Company estimates the global Trusts and Corporate Services market is experiencing above average growth largely due to increased corporate regulation.

The Trusts and Corporate Services Industry is Undergoing Rapid Changes

Despite being one of the most critical professional services responsible for the smooth operation of the global economy, few software providers have focused on the needs of this vital market. The market is under a unique set of pressures that require specific business process automation and compliance solutions.

Increased Regulatory and Public Opinion Pressure

In the wake of large-scale media scrutiny, government regulations

have increased. As such, compliance costs and requirements continue to rise. Using manual or non-automated processes and ad hoc databases, the risk for human error or faulty and aged data increases, creating exposure to litigation risk and government sanctions and fines. Streamlining operational processes and controls in the compliance process reduces these risks while maximising revenues.

Clients Are Demanding End-To-End Digitisation As Consolidation Pressure Increases

Recently, new Trust and Corporate Services clients include a technology diligence as part of their vendor selection. This dynamic is only going to accelerate. As consolidation advances through the industry, larger companies will be able to provide a better end-to-end digital experience for the clients, as well as demonstrate improved compliance and digital security with privacy protections.



Firms Must Maintain Their Unique Level of Client Trust In Order To Thrive

Trust and Corporate Services firms occupy a unique position within the professional services world: spanning the disciplines of legal, accounting, advisory and financial services, trusts and corporate services firms have a high level of trust with their clients. Privacy and guarantees of maintaining it are critical to winning and maintaining business.

Intapp has developed solutions specific to the needs of this critical industry:

Intapp Walls Keeps your clients information confidential at a policy level:

Sensitive client and internal data can be secured according to client demand, regulation, or internal policy with enforcement active not only within Intapp but out to all enterprise applications, ensuring even application of security and privacy policies for each client, type of client, or type of engagement.

Intapp Intake ensures professional and compliant client onboarding, including AML checks:

Automation of the end to end client or new business on boarding process prevents bottlenecks so decreasing client frustration and shortening time to revenue realisation.

Intapp Terms keep high volume contract terms manageable:

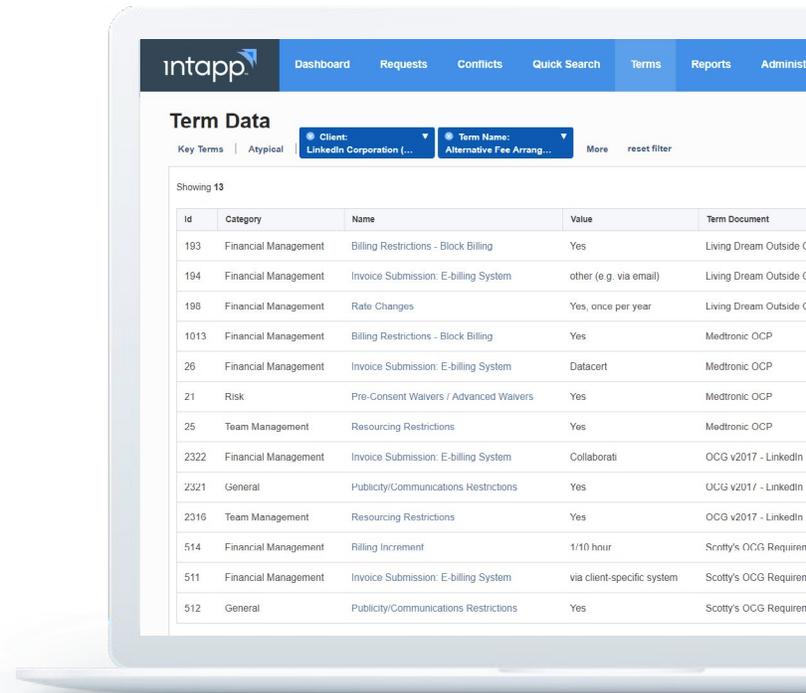
Client or account specific legal terms can be captured automatically from workflows and stored in a fully searchable environment to ensure all areas of your business are aware of their specific client responsibilities at all times.

Intapp Time facilitates the tracking of all billable activity:

Email, telephone, time spent preparing complex documentation can all be tracked and reported to ensure exceptional performance and precise billing

Intapp's Workflow and Integration Solutions help the Trust and Corporate Service industry with specific applications such as:

- Expense Management
- Purchase to Pay
- Service to Cash
- Work Management
- GDPR compliance
- Conflict of Interest clearance processes



Intapp: Trusted by the Most Demanding Compliance and Ethics Clients

Intapp is trusted by professional services firms worldwide, including 92 of the largest global law firms, over half the largest global accounting brands, and some of the largest global financial services firms and investment banks. Intapp provides software and services that enable professional services firms to thrive in an increasingly competitive marketplace by improving operational efficiency, increasing profitability and driving client success.

Intapp maintains offices in 6 worldwide locations to serve our customers, and services clients in the Caymans, Isle of Man, Bermuda, Guernsey, Jersey, Luxembourg, Singapore, and other locations.