



Administrator Features

ViewPoint Software for Business Ltd

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Feature Summary

q **Statutory and Compliance**

- All entity types / all jurisdictions
- Entity type screen configuration
- Registered office and statutory addresses
- Annual return details and dates
- AGM details and dates
- Officers - min required, max allowed, quorum number
- Objects / purpose details
- Memo & arts / by law details
- Change of name details
- Foreign registration details
- Business registration details

q **Share Registration and Ownership Analysis**

- Multiple share classes
- Multi currency
- No par / nil nominal value shares
- Nominal / premium allotment
- Fractional shares (10 decimal points)
- Capital reclassification
- Calls, nil paid, partially paid shares
- Forfeiture and redemptions
- Beneficial ownership assignment
- Proxy holder appointment
- Automated minutes, share certificates, statutory forms, stock transfer forms, etc.
- On screen entity or structure analysis
- Analysis export - MS Word, Excel, Visio, etc.

q **Statutory Officer and General Relationships**

- Statutory / legal officer details
- Statutory process for appointment / resignation / rotation
- Alternate officer details with link to primary officer
- Unlimited number of officer types
- General relationships
- Unlimited number of relationship types
- Officer / relationship type specific auto-generated documentation

q Trust and Beneficiary Management

- Beneficiary register
- Unlimited number of beneficiary classes and levels
- Unlimited trust types
- Multiple criteria selection on trust purpose
- Beneficiary appointment and cessation date
- Individual beneficiary benefit conditions
- Distributions register (currency)
- Optional restriction of distributions to named beneficiaries
- Beneficiary bank details

q Assets, Liabilities, Securities & Investments Registers

- Segregated register for assets, liabilities, securities and investments
- Unlimited number of sub-categories
- Multi currency
- Register record specific transaction history
- Revaluation feature
- Per record transaction statement

q Bank Account Maintenance

- Account name
- Account number and IBAN number
- Account currency
- Resolution and account opening dates
- Signing arrangements
- Per account named signatories
- Individual signatory group
- Signing restrictions
- Copy feature to copy signatories
- Multi currency transaction register
- Base currency valuation on transaction register
- Voucher and summary statement feature

q Global Change

- Per user or team view of many features
- Statutory officer
- Non-statutory relations
- Change of registered / legal address
- Change of business address
- Change of general address

- Bank account signatory
- Parameterised by relationship type, entity type and status
- Change all or change selected records
- Optional prompt for statutory and other related auto-generated documents
- Automatic statutory register update
- Selective global change
- Automated entity creation

q Automated Documentation

- Commonly used multi-lingual statutory forms for 20 Jurisdictions
- General template libraries for non jurisdiction specific templates
- Multiple Correspondence templates
- Over 500 standard templates
- Templates event linked to database updates
- Automatic user prompting
- Intuitive template selection per jurisdiction
- Minute wizard
- Automatically populates templates on generation
- Single or Batch form generation
- Easy to customise templates with wizard

q Universal Features

- Centralised Master File
- Centralised Address Book
- Multiple Client Addresses
- Multiple contact Details
- User Alerts
- Relationship Management
- Automated To- Do List
- Form / Template Library
- File Notes / Recurring Tasks
- Correspondence Generator / Register
- Safe Custody Register
- Compliance Register
- File Archives Register
- Enquiry
- User Fields