



ViewPoint Software for Business Ltd

Administrator Features

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<u>Administrator Features</u>	
Feature	Feature Summary
Statutory & Compliance	<ul style="list-style-type: none"> • 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 • Mem & arts / by law details • Change of name details • Foreign registration details • Business registration details
Share Registration and Ownership Analysis	<ul style="list-style-type: none"> • 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.
Statutory Officer and General Relationships	<ul style="list-style-type: none"> • 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
Trust and Beneficiary Management	<ul style="list-style-type: none"> • 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

Assets, Liabilities, Securities & Investments Registers	<ul style="list-style-type: none"> • 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
Bank Account Maintenance	<ul style="list-style-type: none"> • 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
Global Change	<ul style="list-style-type: none"> • 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
Automated Documentation	<ul style="list-style-type: none"> • 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

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

