

## COST-EFFECTIVE DOCUMENT HOSTING AND WEB ACCESS IMPROVES CLIENT AND INVESTOR EXPERIENCE

“We are very pleased with the solution provided by Computershare. We were investing a lot of resources to comply with tax reporting requirements while keeping our investors happy. Our relationship team at Computershare took the time to understand our pain points and work with us on a document hosting solution that is more efficient for us and more secure for our investors.”

- Director of Investor Relations

### Background:

Our client is a leader in the renewable energy revolution, innovating and investing in agriculture, chemistry and engineering technologies. The company is privately held.

### Situation:

The company finances its work through “per project” offerings, resulting in a diverse investor population with numerous entity investors. Multiple offerings lead to several websites and systems to provide investors with the materials and tax forms they need, which becomes difficult to manage. To improve their investors’ experience, they sought the following:

- › A central website to share documents with individual and entity investors without allowing former investors access to the same information.
- › A way to provide investors with K-1 tax documents by March 31.
- › A cost-effective method to share documents that would accommodate investors in rural locations.

### Solution:

As the client’s transfer agent, Computershare provides secure, individualized hosting and viewing

for important investor documents. Investors create individual accounts on our Investor Center™ website to view and manage their holdings. Through the website, investors can access their K-1 tax forms, which are created by a third party and loaded onto our system. Current investors also have access to electronic copies of the company’s quarterly and annual reports which are produced and mailed by Computershare. The client has the ability to view all investor account information, holdings and documents through our client portal, Issuer Online.

### Results:

The client and their investors are very happy with the new system. The client is now able to direct investors to the Investor Center website to review important information and resolve their inquiries. Secure online access also ensures former investors are not presented with confidential information. The cost-effective solution allowed the client to deliver K-1 tax forms ahead of schedule. And just as importantly, current investors can access materials in one convenient location without the need for multiple sites.

For information on how we can support your complex business needs, visit [beyondthecaptable.com](https://www.beyondthecaptable.com).