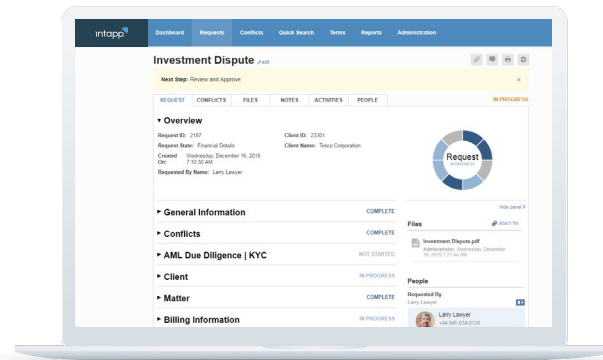


Four steps to evaluating new business comprehensively and strategically

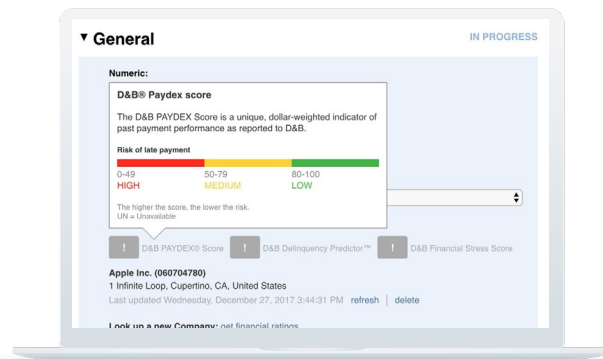
1 Review progress of a request across conflicts, AML, client due diligence, financial evaluation, and more from a single dashboard



Business problem

- Firms rely on manual processes and multiple searches to perform comprehensive client due diligence and conflicts checks.
- Firms struggle to (or neglect to) evaluate potential customers from a financial risk perspective.
- Approvals processes are ad hoc based on perceived riskiness of the work as opposed to objective analysis.

2 View a potential client's financial profile to determine riskiness



How Intapp helps

- Intapp standardizes client due diligence and conflicts checks, consolidating review of client information and third party data to support comprehensive evaluation.
- Intapp seamlessly brings client financial information into the consolidated review, enabling firms to consider not just the ethical risk of a potential client, but the financial risk as well.

3

Score a potential client

...een defined for this...

Term Description

Definition of "Client" The definition of who/what constitutes the "client" beyond the immediate client.

Information Security Controls Provisions for information security controls.

Non-billable - Expenses Non-billable - Expenses

PAYDEX Score:

65 D&B PAYDEX Score

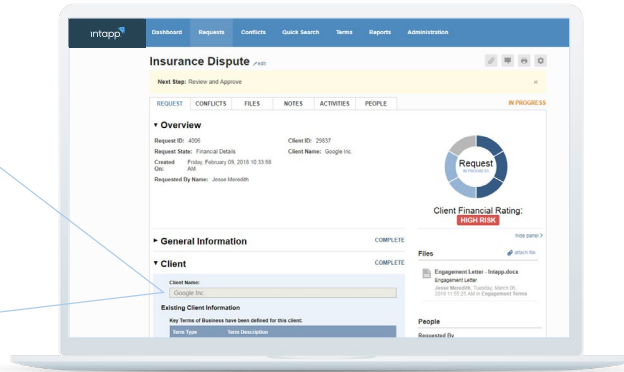
Alphabet Inc. (079942718)
1600 Amphitheatre Parkway, Mountain View, CA, United States
Last updated Friday, March 16, 2019 7:14:01 AM refresh | delete

Look up a new Company: company lookup

Client Due Diligence

Do you request a retainer from the client for this matter?
No

Are you switching law firms for this matter? >



Results

- Reduce the time risk staff spend performing client due diligence and preparing conflicts reports, as well as the time lawyers spend reviewing reports, all while improving the quality and depth of client evaluation

4

Access all the information you need in one place

Firm Systems



Premium Content



Government Sanctions Lists



- Identify financially risky clients before you accept the business
- Enable prescriptive vetting and approval processes to facilitate risk-based modifications to deal structure