## **iStockTrack™**

Works with StockTrack<sup>™</sup> to provide Self Service access for issuers and/or shareholders to StockTrack<sup>™</sup> reports and proxy voting Figtree Software



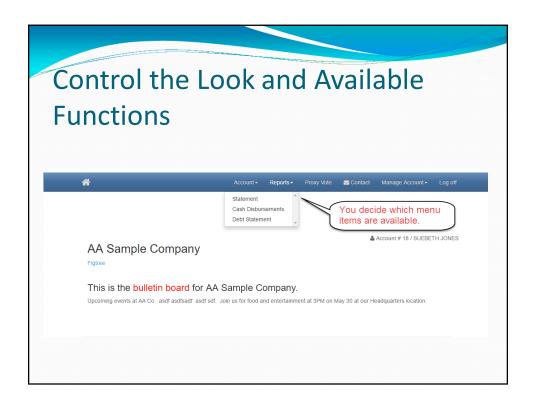
## 24/7 Access to Your Shareholder Data

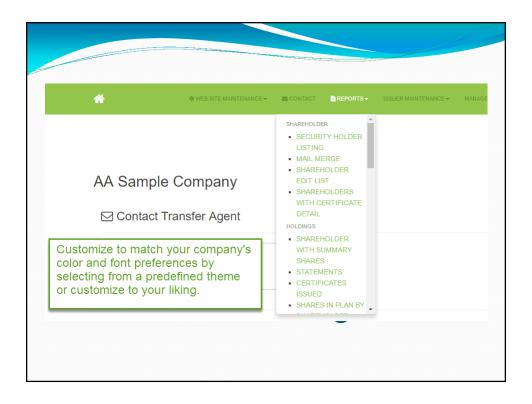
- 24/7 Self Service Access for Issuers
- Ability for Issuers to use StockTrack<sup>™</sup> mailing tools to contact shareholders
- 24/7 Self Service Access for Shareholders to View Holdings
- Proxy voting
- You decide what you want Issuers and Shareholders to see
- Real time access to StockTrack<sup>™</sup> data
- Automated Password reset
- Many Security Features

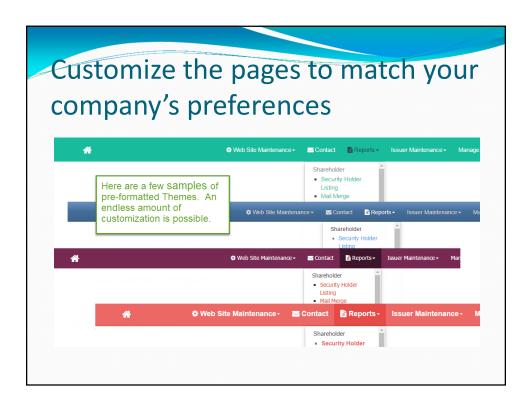


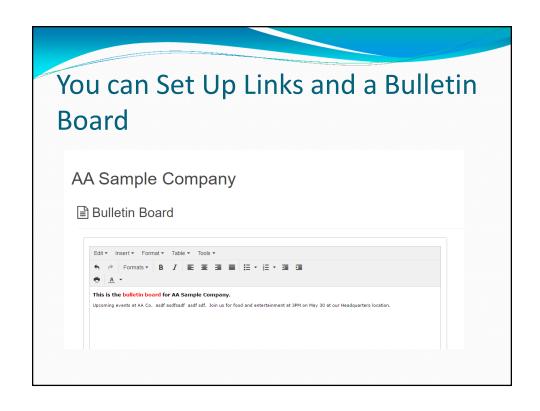
### iStockTrack™ is Customizable

- Select your own 'look and feel' via Themes
- Select the menu items that issuers and/or shareholders can access
- Add links and a bulletin board
- Shareholders or Issuers can view on smart phones, notepads and other small scale devices as well as full sized computers







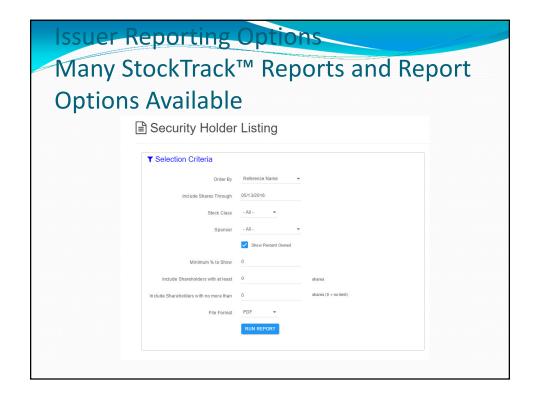


# Your Custom Footer Can Appear on All Pages

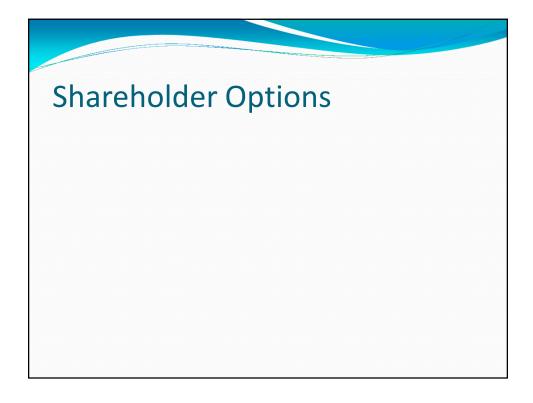


## Users Manage Their Own Passwords

- You won't get calls and emails asking you to reset passwords!
- Forgot password link an email is sent directly to the shareholder with a control code so that they can update their own password
- Many Security Features such as:
  - Minimum Password length
  - System lockouts
  - Automatic timed log off



Issuer Module
Mail Merge Options can be given
to Issuer



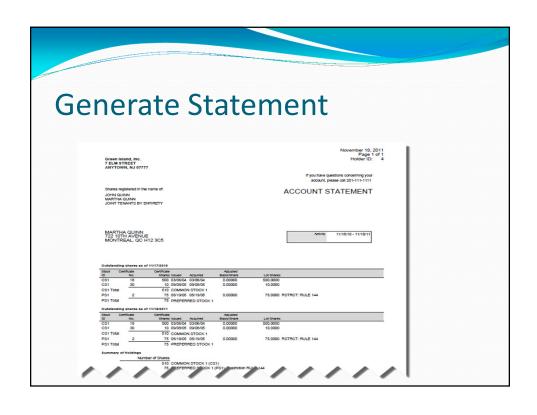


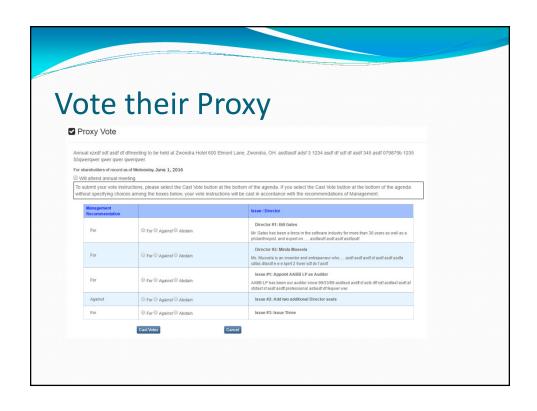
# View and/or Edit Address, Phone, and Email Information

- Shareholders can view and, optionally, maintain their own email address, phone numbers, and mailing address information.
- The TA has the option to approve or reject any requests for changes

#### Holders Can Update Address Info

- Shareholders can review their address, phone number, and email information and can, optionally, update it if necessary
- The update request is sent to the TA who can accept or reject it
- Status of the change (accepted or rejected) is emailed to the shareholder





# You determine which menu items are available

#### **Documentation**

- Configuration Information
- Configuration Guide
- Users Guide
- Start Up as well as Continuing Phone and Email Support

#### Where does iStockTrack™ reside?

- iStockTrack<sup>™</sup> is installed on a computer used as a web server at your location
- The web server does not have direct access to StockTrack™ data
- Your StockTrack<sup>™</sup> data remains private and secure
- Controlled queries are used to pass information from StockTrack™ to iStockTrack™

## **Advantages**

- Provide excellent customer service 24/7
- Provide a great image for your company
- Cut down on time spent responding to phone inquiries
- Provide additional information via links and the Bulletin Board

#### Types of iStockTrack™ Licenses Available

- Single Issuer License for Self-Issuers
  - Shareholder Access and/or
  - Issuer Reporting Access
- Unlimited License for Commercial Transfer Agents
  - Any number of issuer companies
  - Both Shareholder and Issuer access

#### iStockTrack™ Pricing – Single Issuer

- \$1500 Initial License including support on setup and configuration +
- \$500 Annual Support for Shareholder access for one issuer company
- \$350 Annual Support for Issuer reports access for one issuer company

# Unlimited Issuers Pricing for Commercial TA's

- Unlimited Issuer license
  - \$1500 initial license fee
  - \$1300/year support and maintenance fees

### **Next Steps**

- Contact us for information on how you can get started with iStockTrack™
  - Janice Gonzalez 973-251-9414 stock@figtree.com
  - Abby Rosenstein 973-251-9415 <u>arosenstein@figtree.com</u>
  - Additional information available at www.stocktracksoftware.com