

# Securities and Shareholder Recordkeeping

KNOW THAT YOU'LL BE READY WHEN  
OPPORTUNITY COMES KNOCKING



You are plenty busy growing your business, you shouldn't need to divert significant time and resources to also tracking your shareholders and securities.

InvestmenTrax<sup>(sm)</sup> is fast and easy to use, leaving you to focus on the next big idea.

*“We missed out on a funding event because our cap table and share records weren't in any shape to share with potential investors. No way will I take that risk gain.”*

Plan Management's proprietary platform, InvestmenTrax<sup>(sm)</sup>, offers securities and shareholder recordkeeping for the busy private company manager. Reporting and recordkeeping goes beyond your cap table to track the lifecycle of your shareholders and securities.

- Manages common, preferred, warrants, and convertible securities
- Easy-to-customize investor classifications and documents
- Issue, cancel and transfer securities with a few simple clicks
- Captures the full transfer and restriction history of your securities
- Fully embedded Cap Table with liquidation and funding event modeling
- Share information via the Shareholder Portal with your investors
- Integrated with our OptionTrax<sup>®</sup> equity compensation system
- IPO Expertise and guidance

Please call for a free product demonstration ▶▶▶

**INVESTMENTRAX<sup>®</sup>**

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