



Announcing Filejet 3.0: What's New in Entity Management Automation

Greater control, more visibility, with everything you need in just two clicks.



When entity compliance is managed on a spreadsheet, with legacy service providers, or traditional registered agents, the only certainty is, well, *uncertainty*.

If you don't have total visibility into the status of your entities, annual report filings, and renewals of business registrations and DBA/fictitious names – and you can't access the information you need in a couple of clicks – you really can't be certain that you're in compliance.

If that's the boat you're in, you're not alone. For years, good options *just didn't exist* when it came to managing legal compliance. You either had to get into the weeds yourself or rely on a registered agent who didn't always get things done.

Then Filejet **came along** and *digitized* the work of legal entity management compliance – and removed the pain and mess of it in the process.

The difference between old school entity management and Filejet is night and day. Or, in the words of one **Filejet client**, it's like going from “an abacus to a supercomputer.”

Helping **in-house legal teams**, general counsels, managing directors, business owners, CFOs and others oversee compliance is what gets the Filejet team up in the morning. It's the driving force behind everything we do – including the latest phase of our evolution.

Over the last six months, Filejet has been diligently working to take everything users already love about the platform – including transparency, ease of use and automation – to the next level. You could say, the “supercomputer” of our current platform has been upgraded to a *super-supercomputer*.

With this new update, you will be able to spend even less time – and psychic energy – thinking about compliance. The redesign gives you more control, more visibility, and even more peace of mind.

Let's dig in.



Updates at a Glance

What's New



Redesigned Dashboard

Next level visibility and supercharged peace of mind.



Organization Chart

More ways to view and manage entities as you scale.



Digital Registered Agent

Revolutionary, next generation registered agent service.



Business License Portal

Automatic, painless business license renewal.



Fictitious / Trade Name Portal

The easiest and most transparent way to renew DBAs.

What's Improved



Upgraded Entity Profiles & Viewing

Gain greater insight into entities, more quickly.



Enhanced Super Admin Capabilities

More control with fewer touchpoints.



Improved Ease of Use

Find just what you're looking for with deeply intuitive navigation.



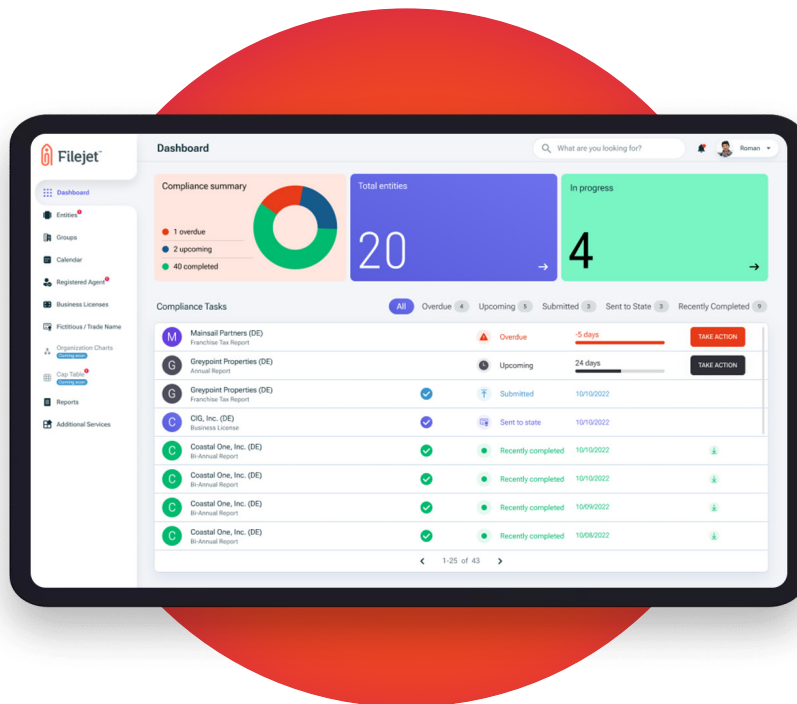
Revamped Reporting

Generate showstopping reports with a click.

A Closer Look: What's New

Redesigned Dashboard

When you log into Filejet, things will look a little different.



The dashboard has been redesigned with visibility and ease of use front-and-center. Now, you can see exactly where entities stand in *one glance*.

A compliance snapshot sits at the top of the dashboard, so you can quickly determine whether action needs to be taken on compliance tasks. Information about individual entities lies just below.

To check the status of individual entities, you can click on the newly created “Compliance Task” tabs:

- ▶ Overdue
- ▶ Upcoming
- ▶ Submitted to Filejet
- ▶ Sent to State
- ▶ Recently Completed

In addition to gaining quick insight into where you stand, you will also be able to move forward on compliance tasks with greater efficiency. Instead of having to navigate to individual entity profiles, you can ‘Take Action’ right from the main dashboard for upcoming and overdue entities.

Organization Chart

Filejet's highly anticipated org chart is finally here.

With the inclusion of this custom org chart generator, mid-market companies will now have everything they need to scale with ease, all in one place: the Filejet platform.

We've broken the release into two phases – the first of which is being launched now.

In this phase, you will be able to create org charts based on any entities in the system. Custom filtering will allow you to create org charts based on filings per state, associated DBAs, officers, and more. As you type key terms into the search bar, custom org charts will automatically generate.

If action is needed for a particular entity, a notification symbol will appear, and action can be taken directly through the org chart.

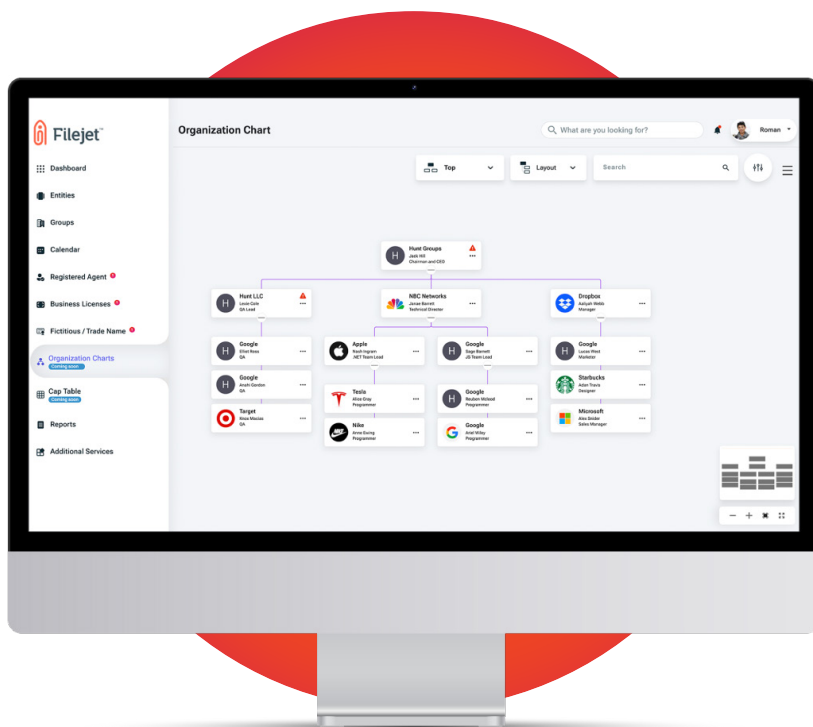
Other functionality included in this phase of the release includes:

- ▶ Adding new entities
- ▶ Updating entity profiles
- ▶ Getting entity summaries
- ▶ Exporting and downloading org charts in multiple formats

Any changes made to the org chart will flow into your main entity listings – and vice versa. No more bouncing from page to page. No more unnecessary clicks and scrolling.

The second phase of the release – expected to launch late fall 2023 – will allow you to build out org charts based on owner percentages, shareholder information and LLCs. (Did we just hear a capital investor scream “*hallelujah?*”)

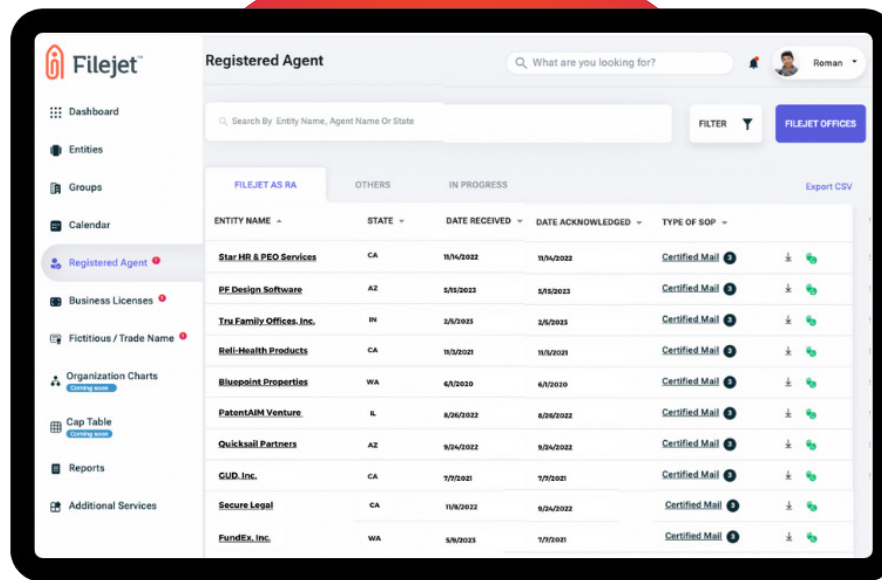
Continue to watch this space for more.



Your Digital Registered Agent

Establishing – and using – Filejet as your registered agent will now be *even more* frictionless. If you've ever searched for next generation registered agent services, look no further.

Once Filejet is your registered agent, you will be able to quickly and easily view any notices received *directly on the platform*.



Now, Service of Process (SOP) notifications will be uploaded to the portal and time stamped. You can view, acknowledge, and download mail directly from the platform.

Your organization's Super Admin(s) (*more on that below*) can route any SOP notification (including certified mail, sheriff's notices and wage garnishments) to specific departments or individuals, so you can rest assured that notices will reach the appropriate stakeholder.

By digitizing the process – and making it fully transparent – Filejet has catapulted registered agent services into the 21st century.

Our pioneering approach eliminates the headaches and hassles usually associated with registered agents and does something that's never been done before: it makes service of process a (hyper-organized and fully visible) breeze.

Business License Portal

For folks on our Professional and Fully Managed platforms, managing business licenses is about to get even easier.

Business licenses can now be viewed and managed in their own dedicated portal. In the spirit of *click-reduction*, the portal can be easily accessed via the dashboard or sidebar. CSV file reports can be generated with a click..

In the portal, licenses can be viewed by county, state, or by associated entities. An unlimited number of documents may be uploaded to each licenses' page and accessed by invited stakeholders.

Upcoming renewal dates will be displayed in the portal, but don't worry – no action is required from you. Filejet will renew your licenses automatically, make sure county fees are submitted to the correct jurisdiction, and send you a notification so you know it is handled.

That means you can *literally* sit back and watch Filejet submit renewals on your behalf. (Though we won't blame you if you don't – you have better things to do.)

If you need to add a new business license, Filejet will *continue* to have your back. Even through the process of adding a new business license can't be automated quite yet, Filejet will do the work for you. Simply fill out an intake form and submit your information. Filejet will obtain your license and add it to the portal to be automatically renewed.

The process is a prime example of Filejet's service extending far beyond its software. As a one-stop-shop, Filejet will manually manage anything that can't be automated. Visualizing the Filejet motto might look something like this: software 🍷 service.

Fictitious / Trade Name Portal

Fictitious / Trade names have also been given their own portal that can be accessed via the dashboard and sidebar.

Prior to renewal deadlines, you will receive a notification from Filejet asking you to confirm information needed to file. But, unlike other entity management "software" companies, Filejet will never let you fall past due. The team will do what it takes – send a politely annoying number of emails, ring your phone off the hook, stand on your lawn with a boom box held aloft, etc. – to ensure you file on time.

On the portal, you can upload an unlimited number of documents related to each fictitious name. CSV file reports can be generated in seconds.

New California DBAs can be added directly through the system. New DBAs for other states can be added by Filejet outside the system, just like with business licenses.

A Closer Look: What's Improved

Upgraded Entity Profiles & Viewing

Upgraded Entity Profiles

A number of small upgrades have given Filejet's Entity Profiles a major facelift.

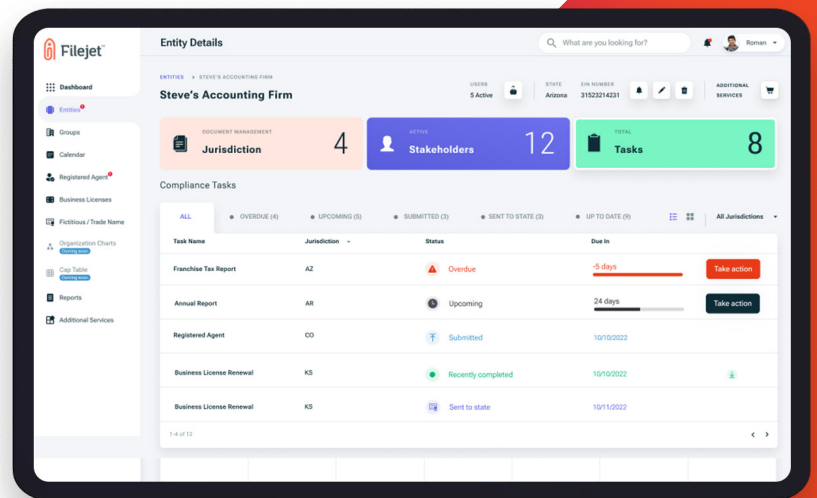
The revamped profiles –which support both U.S. and international entities – have a fresh layout, improved flow and expanded functionality (including enhanced document management capabilities).

Within each profile, you can easily view and take action on entities by jurisdiction, or by the assigned stakeholder, user or department. The new, site-wide universal search bar with enhanced filtering options (by client, state, type and assignment) will allow you to easily find what you're looking for. Custom reminders can be set, so you never miss a deadline.

To make collaboration even easier, internal and external stakeholders can now be invited to view and take action on specific entities, with access controlled by the Super Admin(s).

Also new: entities and groups can be directly exported from the portal, so you can create impressive reports, seamlessly.

The upshot of all those tiny tweaks? Enhanced visibility, greater organization, more intuitive navigation, and even more ways to gain insight into the status of your entities.

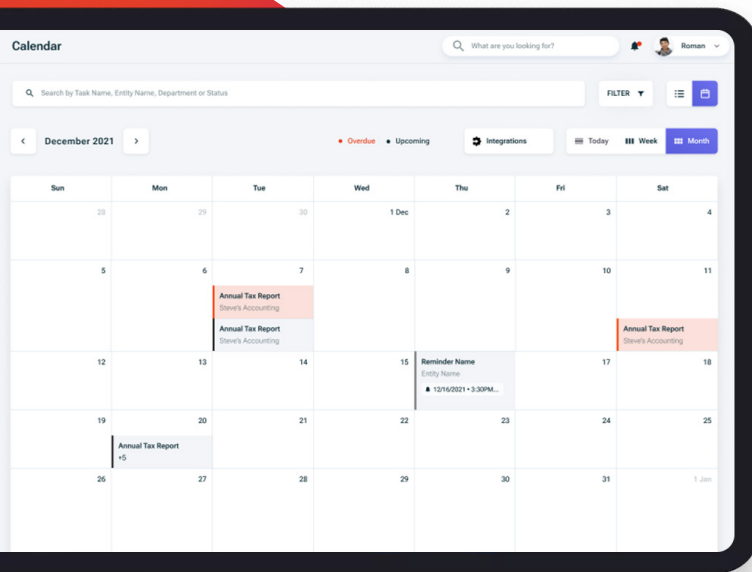


Maintenance Calendar

The maintenance calendar makes it easy to plan ahead – you will now be able to view your upcoming tasks months in advance.

The calendar provides a comprehensive overview of everything in the system, encompassing all states. Reminders for important dates related to specific entities – like contract expirations, option and notice windows, lease dates, contract dates, and more – can be set directly on the calendar, so you can organize compliance tasks in a way that works for you.

Further, Filejet now offers integration with Google and Outlook Calendars, so your compliance tasks can sync with your daily calendar.



Enhanced Super Admin Capabilities

If you are appointed “Super Admin,” you are the official pilot of your organization’s compliance process – congratulations! The update will allow you and one designated co-pilot (if desired) to manage the responsibility with even greater control and ease.

You will also have more autonomy: edits to visibility, notification settings, contact information and more can now be handled directly on the portal. No more changes by request.

And, while this isn’t new for current Filejet clients, here’s some good news for folks still mired in Excel Hell: the Filejet platform eliminates the need to enter information anywhere more than once. Once information is in the system, it will be added wherever it’s relevant.

Here’s a few things you’ll now be able to do in the revamped platform:

User Controls

- ▶ Assign users and departments to specific entities
- ▶ Control visibility of users
- ▶ Manage who receives notifications, invoices, SOPs and maintenance access
- ▶ 48-hour invite control for new users

Billing Controls

- ▶ Break down billing by entity
- ▶ View billing amounts and renewal details for annual subscriptions
- ▶ Gain insight to budget more accurately
- ▶ Facilitate work done by your accounting department

Workplace Settings

Edit contact information directly in the portal – no more changes by request.

Notifications

Edit the frequency of notifications, including:

- ▶ Compliance notifications
- ▶ Custom reminders
- ▶ Invoice notifications
- ▶ General notifications

Improved Ease of Use

Enhanced searching & filtering

The documentation and information required to keep entities in compliance can add up quickly. When the time comes to conduct maintenance tasks, you don't want to waste time digging for some long-forgotten piece of paperwork.

To save you time (and headaches) Filejet created a new and highly advanced universal search bar. Now you can filter options by client, state, entity type, assignment and more. Results will appear and narrow as you type.

The result? You unearth whatever you are looking for quickly and with ease.

Redesigned Sidebar

To make navigation even simpler and more intuitive, Filejet added its go-to services to the sidebar.

Now, instead of searching and scrolling for the information you need regarding registered agents, business licenses and DBAs, you can access it in a click.

Revamped Reporting

The update has made generating impressive reports effortless.

In addition to exporting CSV file reports directly from specific portals, you can access the "Reporting" tab on the sidebar to download reports about anything compliance- or Filejet-related.

Beyond entity, org chart, registered agent, business license, and DBA reports, you can now also download payment and sales reports. In a few months' time, Filejet will also allow you to add and export subscription and billing cycle reports.



Filejet Is Driving Change

You're not alone. Filejet wants to be your partner, your back-office team to help with the heavy lifting. That's why people and companies come to Filejet – they get our platform and our 'support squad' service - the Robin to your Batman, the Thelma to your Louise, the Donkey to your Shrek... the Ken to your Barbie!

For example, with Filejet entity management software and our Managed Service plan, you can automate entity compliance and Filejet can file for you. Filejet's entity management experts will organize, update and file all of your entity reports: every year, in every jurisdiction (U.S. and internationally) – with total visibility into status and costs for you. All related documents are stored in the Filejet cloud.

From Filejet's experience, and as leaders in the mid-market entity compliance space, we've seen a lot. Upon onboarding, our audits show that 44% of Filejet clients have entities they don't know about and 66% have at least one that is non-compliant – due to manual process errors by registered agents or software that issues reminders but doesn't do the work.

Filejet is the entity management solution you (and other in-house counsel, asset managers, business owners and CFOs) don't have to think about, unless you want to.

Connect with an entity management expert today to set up a tour of the new platform.