



## Counterparty Manager: Outreach360

**A single standardized platform to efficiently manage all your counterparty outreach and communication.**

Outreach360 provides a single standardized and auditable platform to create, manage, send, track and store all counterparty outreach for regulatory, due diligence and data gathering purposes. The platform supports bilateral communication between all counterparties and allows you to leverage the existing entity and user information which already exists on Counterparty Manager. It also provides the ability to reach out to users on and off the platform.

Outreach360 is a centralized platform to **engage** with your counterparties and **exchange** information to support regulatory requirements including MiFID II.

Through Outreach360, originating parties can reconcile their outreach population to determine your impacted clients and create bespoke content or leverage multiple industry-standardized questionnaires. It also enables you to distribute disclosures and request completion of questionnaires. Receiving parties can manage requests via a dashboard, provide information/documents, acknowledge disclosures, sign contracts, or ask for more clarification on specific questions directly through the platform.

The platform provides a streamlined, cost-effective way to meet your MiFID II obligations and provide you with the tools to effectively manage your information gathering, publishing and terms of business repapering obligations.

A full audit history of all information exchanged is available on the platform and all data can be fed to downstream systems, for trading, risk and reporting requirements. Counterparty follow-ups are automated through timely reminders and you can view the status of all client outreaches via an interactive dashboard.

### Centralize Information

Create, track and send/receive documentation, legal contracts and questionnaires through one portal

### Secure exchange

Securely exchange confidential documentation through a single web-based portal which provides full visibility into client interactions and responses.

### Streamline Operations

Streamline your repapering workflow by agreeing, e-signing, returning, tracking and storing your contracts and regulatory information in one location. Extract information easily in a normalized format.

### Drive Standardization

On and off-platform users can collect common client data through standardized and fully customizable questionnaires to meet regulatory requirements (e.g. MiFID II, EMIR, FX Code of Conduct, KYC/AML, Tax Remediation).

### Enhance Transparency

View the status of all tasks in real time through a customizable dashboard with real-time information and reporting to view the progress of your workflow.

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