



Transfer Agent Services

Choose The #1 Transfer Agent in Client Satisfaction

With EQ as your Transfer Agent, you and your shareholders will benefit from leading Transfer Agent services and expertise, refined over nearly a century of business. With experience across a range of industries and organization sizes, we can support large volumes of transactions with accuracy and timeliness.

Benefit From a Comprehensive Range of Services

- Transfer Agent
- Corporate Actions Services
- Annual Meeting Services
- Equity Plan Solutions
- Paying Agent
- Escrow Agent
- Exchange Agent
- Depository Agent
- Corporate Proxy Services
- Ownership Intelligence Services
- Capital Raising Services
- Asset Recovery Services

95+

YEARS

of expertise in Transfer Agency and Share Registry services¹

19.8

MILLION

shareholders in the U.S.¹

\$264+

BILLION

in U.S. dividends paid annually¹

1.1+

MILLION

transactions processed for shareholders annually¹

Experience the EQ Difference



Dedicated Team of Experts – A dedicated Relationship Management team with an average of 15+ years of industry experience.



Seamless Execution – A dedicated team processes, guides, and executes transfer agent services. With over 7,500 annual meetings analyzed, we also provide unique insights and strategies for the preparation and seamless execution of your annual general meeting.¹



Consultative Guidance – Consultative, collaborative and high touch approach to support your business goals and your critical transfer agent service needs.



Data-Driven – Delivering comprehensive data-driven ownership intelligence that provides a deeper level of insight on your shareholders.



Shareholder Support – EQ’s Transfer Agent expertise supports you through the entire shareholder experience with timely, accurate and professional customer services for your shareholders’ inquiries. Our call center manages 1.8+ Million calls annually and achieve a 90% first-call resolution¹.



Transparent Fees – Transparent pricing.

STRENGTH IN NUMBERS

#1

transfer agent
in client satisfaction²

99.2%

processing accuracy
in the U.S. in 2023¹

90%

first call resolution in
Customer Care Center¹

500+

corporate actions
performed¹

7,500+

annual meetings
analyzed¹

¹Based on EQ proprietary data
²Group Five Financial Reporting
Benchmarking Study, 2023



Notable Corporate Actions

\$31 Billion

Spin-off of GE
Healthcare from
General Electric

\$18.8 Billion

ONEOK acquisition of
Magellan Midstream
Partners

\$8.1 Billion

Apollo Funds acquisition
of Univar Solutions

\$1.8 Billion

Madison Dearborn
Partners acquisition
of MoneyGram

\$1.5 Billion

Spin-off of NCR Atleos
from NCR Voyix

\$1.4 Billion

Spin-off of Sphere
Entertainment Corp. from
Madison Square Garden
Entertainment Corp.

Transfer Agent to These Leading U.S. Companies

- 3M
- Procter & Gamble
- GE
- American Airlines
- Mastercard
- Workday
- CVS
- Intuit
- T-Mobile
- Comcast

About EQ

EQ are specialists in helping you better understand and manage the ownership of your company through critical events across the corporate lifecycle. As trusted advisors, we provide strategic insight and operations expertise through our core business units in Transfer Agent Services, Employee Plan Solutions, Proxy Services, Private Company Services, and Public Relations & Investor Relations Services.

Globally we serve more than 12,000 clients (49% of the FTSE 100 UK and 35% of the S&P 500), with over 20 million shareholders, through 7,500 employees in 19 markets around the world.

Contact an expert today

Email: newbusiness@equiniti.com | Visit: equiniti.com/us/public/transfer-agent-services/



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