



# 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 services<sup>1</sup>

# 19.8

MILLION

shareholders in the U.S.<sup>1</sup>

# \$167+

BILLION

in U.S. dividends paid annually<sup>1</sup>

# 1.1+

MILLION

transactions processed for shareholders annually<sup>1</sup>

## 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.<sup>1</sup>



**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 resolution<sup>1</sup>.



**Transparent Fees** – Transparent pricing.

# STRENGTH IN NUMBERS

## #1

transfer agent  
in client satisfaction<sup>2</sup>

## 99.2%

processing accuracy  
in the U.S. in 2023<sup>1</sup>

## 90%

first call resolution in  
Customer Care Center<sup>1</sup>

## 500+

corporate actions  
performed<sup>1</sup>

## 7,500+

annual meetings  
analyzed<sup>1</sup>

<sup>1</sup>Based on EQ proprietary data  
<sup>2</sup>Group 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 Private Company Services, Transfer Agent Services, Employee Plan Solutions, Proxy Services and Bankruptcy.

Globally we serve 6,700 clients (49% of the FTSE 100 UK and 35% of the S&P 500), with over 40 million shareholders, through 6,500 employees in 5 markets around the world.

Contact an expert today

Email: [newbusiness@equiniti.com](mailto:newbusiness@equiniti.com) | Visit: [equiniti.com/us/public/transfer-agent-services/](https://equiniti.com/us/public/transfer-agent-services/)



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