SH

Shareholder Mgmt.

Automates management, reporting and dividend payments to shareholders.

- ASP model, hosted by Rackspace.com

- Ability to handle Sub-S & C-Corp dividend payments

- Capability to print certificates, handle stock splits/stock dividends

- Calculate and pay dividends, ACH payments, tax reporting

- Track warrants and options

- Complete reporting (exports into XML, CSV, TAB, HTML & Excel)

- Generates 1099 forms and handles electronic tax filing

- Online shareholder history with easy lookup

The Shareholder Management application performs the complex task of managing stock splits, paying dividends, creating tax forms and maintaining warrants & options. The robust set of features include printing of dividend checks or payments by ACH, generating 1099's, electronic tax filing and printing certificates. The system also offers C Corp or S Corp dividend payments and reporting.

SH
Shareholder Management
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IRS 1099

- Generate 109 Create electronic IRS files for 1099DIV and 1099B file for upload to IRS FIRE
- 9DIV and 1099B forms
- Print 1099DIVs and 1099Bs

CERTIFICATES

- Capability to print certificates, handle stock splits/ stock dividends
- Unlimited Certificate Classifications
- Flexible Certificate printing

REPORTING

- Complete reporting with export options to: *XML, CSV, TAB, HTML & Excel formats*
- Online shareholder history with easy lookup
- Several reporting features complimenting shareholders, shares, warrants/options, and dividend history
- Audit Log reports with user login history & active sessions

DIVIDENDS

- Pay Dividends via Check or ACH
- User Friendly Dividend Calculation and payment creation via Check and ACH
- Ability to handle Sub-S & C-Corp dividend payments

SHARES MAINTENANCE

- Easily Surrender/Transfer Shares
- Partially Surrender/Transfer Shares
- Surrender Shares to the Treasury
- Issue stock splits

WARRANTS AND OPTIONS

- Track warrants and options
- Issue a warrants/options with date constraints and exercise into shares
- View a list of all active, exercised, unexercised and expired warrants/options

PROXIES AND PROPOSITIONS

- Create and manage propositions
- Vote on propositions by shareholder
- Print proxies, ballots, and propositions reports

CUTTING EDGE DESIGN

- ASP.net application hosted by Rackspace
- Automate the management, reporting and payments to shareholders
- Dashboards display shareholder data in graphical views *(top 10 shareholders, shareholders by class, etc.)*

SECURITY

- Multi-User
- Ability to enable password parameters for users
- ASP.NET Browser Based interface
- Full Audit Reports for all changes made to an invoice
- Create permission Groups to limit users access
- Create unique users password requirements
- Set a lockout time, password expiration and number of failed attempts before lockout
- Full Audit history reports that include all the user's activity within the application