

Your portfolio is our priority



Moving locations or changing your financial institution's name generates a long list of tasks to accomplish. But few have higher stakes than updating the liens in your portfolio to reflect your new information. There are real risks to not updating your portfolio and you may not have the staff resources available to tackle such a big project.

Change is constant

Financial institutions decide to change their name and/or address due to a merger or acquisition, changing business strategy, for market differentiation, or other reasons. Updating your portfolio to reflect these changes can be an overwhelming task for financial institutions with hundreds to thousands of active liens. But failing to make those updates promptly invites increased risk.

Protect your assets

If the Secured Party Names (SPN) on liens are not updated with the new/correct name and/or address, the following risks are possible:

Change	Risk
 Name change	If liens are not updated, the secured party may not receive a favorable judgment with lien priority in certain scenarios.
 Address change	Any bankruptcy notices to the secured party may not be received, which could result in losing your fair share of the collateral.

With everything else you are managing due to a move or name change, can you handle the additional workload to make updates across your entire portfolio?

The value we deliver:

- ✓ **Employee productivity**
Focus on your core business while we efficiently handle information changes in bulk
- ✓ **Industry expertise**
Leverage our lien management experience and up-to-date jurisdictional knowledge
- ✓ **Mitigated risk**
Have confidence your liens are properly updated
- ✓ **Fast results**
Updates are made quickly with minimal disruption to your day-to-day workflow

Don't go it alone


There are several disadvantages to handling these updates on your own:

- **Employee productivity:** Filing UCC-3s one-at-a-time is time-consuming and takes employees away from other important tasks.
- **Higher risk:** While liens remain incorrect and not updated, your lien priority is at risk.
- **Keying mistakes:** Manual rekeying of new information increases the likelihood of errors.

Wolters Kluwer has the answer


We offer **Financial Institution Change Services** to help you quickly and efficiently update the SPN and address on liens. Immediately, we get to work updating the changes to your financial institution information by filing UCCs in bulk using streamlined processes.

With our **Financial Institution Change Services Package** you gain efficiency, accuracy and peace of mind



UCC-3

We take action to maintain your standing by bulk filing UCC-3 amendments and assignments with correct information.



Service team

- A dedicated account manager for your project
- Personalized services based on your business need
- A worry-free experience



Professional Services give you the edge

When you work with our Professional Services team, you benefit from industry-leading professionals ready with automated tools and expert knowledge to support lenders dealing with bulk UCCs. We help ensure your UCC filings are up to date, so that the correct name and address are reflected, liens are protected, and any notices are sent to the correct location. We can seamlessly implement our services with minimal disruption to your core business activity so you realize time and cost savings more quickly and less expensively than making these changes manually on your own.

About Wolters Kluwer Financial & Corporate Compliance

Wolters Kluwer (EURONEXT: WKL) is a global leader in information solutions, software and services for professionals in healthcare; tax and accounting; financial and corporate compliance; legal and regulatory; corporate performance and ESG. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services.

Wolters Kluwer reported 2024 annual revenues of €5.9 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 21,600 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands.

Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX, Euro Stoxx 50, and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the US (WTKWY).

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