



Lien Solutions | Portfolio Sync

# **Portfolio Sync** For the Most Complete, Up-to-Date View of Filings

Lenders often use multiple sources to file UCC financing statements. Some may use law firms or title companies to file their highest value or most complex filings. Others may file a portion directly with the secretary of state or use multiple third-party providers. However, having filings fragmented this way makes it harder for you to maintain a complete and accurate view of your filing portfolio and to evaluate overall lien portfolio health; and even more difficult to take actions on your UCCs. Now there's a better way.

#### **Complete Portfolio Visibility**

Introducing Portfolio Sync, the first-of-its-kind solution that mitigates the risks posed by gaps in your filing portfolio by using public records data in a groundbreaking way. With Portfolio Sync, you have a single view in iLien that presents all of your filings, regardless of how or by whom they were filed.

Here's how it works: the product uses secured party names and addresses to search through public records and to identify your public records filings that do not exist in your iLien portfolio. The product then "syncs" these identified filings with your iLien filings to generate a single, comprehensive view. This Portfolio Sync view then becomes your main and most complete portfolio in iLien, allowing full visibility across your secured interests.

#### **An Automated Solution**

Portfolio Sync goes beyond a single portfolio snapshot. With a continuous scan, changes to the public record data for a filing are reflected in your iLien portfolio view for peace of mind. And, from within iLien, you can submit UCC-3 filings for continuations, debtor name amendments, assignments or terminations, and have those updates reflected in your iLien portfolio.

## When you have to be right



### THE VALUE WE DELIVER:



ACCURACY Portfolio gaps closed for complete portfolio visibility, including outside filings

#### PEACE OF MIND Automatic, contin

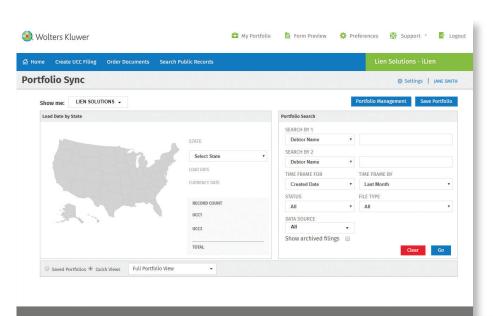
Automatic, continuous updates from public records

### **RISK MITIGATION**

Holistic view of portfolio and filing families for more informed decisions



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#### O Saved Portfolios Quick Views Pending Expirations

#### **Total Lien Management**

The addition of Portfolio Sync is a key step to effective lien management for any organization with UCCs filed outside of iLien. When combined with the other tools in the iLien Manage suite, like Analytics, Reporting, Monitoring and Auto Continuation, Portfolio Sync allows lenders to have a complete, holistic view of their lien portfolio and to be empowered to make better, more informed decisions.

	DEBTOR	SECURED PARTY NAME	JURISDICTION	ORIGINAL FILE NUMBER	ORIGINAL FILE DATE	EXP DATE	ACTION	NOTES
🟦 UCC1	WATERS, NATALIE	ABC BANK	AL :Sec.of State	889900112233	02/28/2014	02/28/2019	Continue	Q
🛍 UCC1	ABC TIMBER COMPANY	LMN BANK	AL :Sec.of State	12-345678	02/28/2014	02/28/2019	Continue	Q
🟦 UCC1	BROWN, JIM	XYZ ELECTRIC	CO :Sec. of State	33322211100	02/28/2014	02/28/2019	Continue	Q
🟦 UCC1	DOE, JONATHAN	XYZ ELECTRIC	CO :Sec. of State	221111121333	02/28/2014	02/28/2019	Continue	Q
🟦 UCC1	LMN OIL HOLDINGS	ABC BANK	CO :Sec. of State	000999888	02/28/2014	02/28/2019	Continue	Q
🟦 UCC1	SMITH, JOAN	STATE & MAIN	KS :Sec. of State	00-543210	02/28/2014	02/28/2019	Continue	Q
🏫 отн	SMITHFIELD & PARTNERS, LLC	QRS HOLDINGS	OH :Sec. of State	99-1234567	02/28/2014	02/28/2019	Continue	Q

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Ready to close the UCC filings gap and get complete portfolio visibility? A Lien Solutions sales representative can tell you more about Portfolio Sync and the full iLien Manage suite of tools. Call 800.833.5778 and choose option 3 today.



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