



## Counterparty Manager: Outreach360

**A single platform to manage and track counterparty outreach, documentation, and communication.**

Outreach360 is a standardized platform to create, manage, send, track and store all client outreach and communication necessary for regulatory updates, due diligence and data gathering purposes. The platform supports bilateral communication between all counterparties and leverages the vast database of entity and user information available through Counterparty Manager.

Outreach360 brings new levels of efficiency by enabling you to engage with your counterparties and exchange information to support regulatory initiatives including:

- MiFID II business rules and re-papering
- Brexit related outreach and documentation
- EMIR and FX Code of Conduct requirements
- KYC and AML related documentation
- US Resolution Stay Protocol adherence confirmation
- Securities Financing Transaction Regulation outreach

Originating parties can reconcile their outreach population to determine your impacted contractual counterparties and create bespoke content or leverage multiple industry-standardized questionnaires. It also enables you to distribute disclosures and request completion of questionnaires. Receiving parties can manage requests via a dashboard, provide information/documents, acknowledge disclosures, send proposed contractual updates, sign contracts, or ask for more clarification on specific questions directly through the platform.

With Outreach360, you can negotiate complex or simple contracts directly on the platform and access the largest network of buy-side and sell-side firms in the industry. Our platform enables you to negotiate contracts based on terms submitted as data point inputs, and improve the quality of your contractual data as data points flow downstream to payment, collateral and risk systems.

### Centralize Information

Create, track and send/receive documentation, legal contracts and questionnaires through one portal.

### Create & Exchange Documentation

Securely maintain confidentiality of your contacts and securely create and exchange documentation through a single web-based portal which provides full visibility into client interactions and responses.

### Streamline Operations

Streamline your repapering workflow by agreeing, e-signing, returning, tracking and storing your contracts and regulatory information in one location. Extract information easily in a normalized format.

### Transferrable Data

Collect all documents and data and download to downstream systems complete with a full audit trail.

## Enhance Transparency

View the status of all tasks in real time through a customizable dashboard with real-time information and reporting to view the progress of your workflow.

## Brexit Remediation and Repapering

The departure of the United Kingdom from the European Union will require mass revision to contractual language on force majeure events, competent or regulatory authorities, data protection clauses, dispute resolution mechanisms and impacted pricing. Leverage our database of self-designated Brexit contacts, conduct outreach and track overall Brexit contractual repapering efforts.

## KYC and Tax Remediation

Complement our KYC Services by conducting outreach for client beneficial ownership information, key controller disclosures, anti-money laundering questionnaires, correspondent banking questionnaires, data points around countries of exposure and tax forms. Features including supporting documentation upload and e-signing capability facilitate the process.

## Regulatory Outreach and Attestation

Outreach to your clients with modified terms of business and disclosures of policy to support compliance with MiFID II, Electronic Trading Due Diligence, FX Code of Conduct and other regulatory initiatives. Manage and track completion of mandatory attestations, including jurisdictional modular protocols and universal stay protocols.

## ISDA Amend

In partnership with the ISDA Amend platform, outreach to your clients to clarify regulatory data, request data refresh, or to comply with recent changes in regulations. Engage clients directly from the platform and benefit from a single source of regulatory information alongside your firm's specific data requests.

## LIBOR Outreach and Tracking

Moving away from LIBOR will result in lenders and borrowers amending and repapering contractual loan documentation while maintaining flexibility within their agreements. Leverage our existing global client database to track and negotiate your contracts on mass. Features include, e-sign/wet sign capabilities, SFTP drop for mass documentation, identify outstanding responses and automate ongoing governance and management information (MI) reporting.

## Securities Financing Transaction Regulation

To implement SFTR transaction reporting, dealers must collect detailed information from counterparties to understand who is in scope and what operational processes are needed. We offer an industry solution to send out standardized questionnaires like ISLA as well as tailored questions. The counterparties can answer such questions once and share them across dealers, who can consume the data via API.

## More information on IHS Markit products and services

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