

Pre-IPO companies need to understand the importance of laying the groundwork for good corporate governance and regulatory compliance before they go public. With Boardfolio, law firms can help their clients meet these requirements by implementing best practices early in the IPO process.

WHAT IS BOARDFOLIO?

Boardfolio is a centralised, highly secure, online board portal solution. It is designed to help board secretaries and directors organise and manage meetings, access documents, communicate with each other, and execute governance responsibilities. Boardfolio powers board workflows of listed companies all over the world. It is the only board portal listed on the London Stock Exchange Issuer Services Marketplace.

HOW IT HELPS YOU AND YOUR FIRM STAND OUT

By making Boardfolio part of the pre-IPO checklist, you help your clients **adopt corporate governance best practices well before listing**. By helping your clients go digital, you position your firm as an indispensable partner focused on providing value and exceptional service to your clients throughout the IPO process — and beyond.

Boardfolio can be leveraged as a “single source of truth” for your clients’ meeting records and documents. It helps eliminate inefficient processes around document collection, communications, and data access, security and validity, so that you as counsel can spend less time chasing paper and more time on higher value, higher priority tasks.

With Boardfolio, you can better address your clients’ complex needs whilst helping them reduce risk and increase efficiency.

Here’s how our digital board management solution supports law firms and your work with IPO clients:

INCREASE EFFECTIVENESS

Drive high-value conversations and outcomes with your IPO clients.

- Close data gaps and provide swift responses to queries with anytime, anywhere access to client board-level information.
- Collaborate and exchange instant feedback when reviewing listing documentation (e.g. filing applications, prospectus, agreements, etc.).
- Efficiently manage different sets of clients and multiple boards with one log-in.

STAY ALIGNED

Work cohesively with all stakeholders.

- Monitor and assign tasks to client boards, advisors, or legal counsels to move the IPO transaction forward.
- Seamlessly hand-off or sign-off on client filings, letters, resolutions, and statements with e-signatures.

MANAGE SECURITY RISKS

Ensure the security and privacy of client data.

- Protect confidential client information and correspondence.
- Prevent operational, financial, and reputational damage due to security breaches.
- All data and documents are protected by advanced encryption.
- Boardfolio is ISO 27001 certified and GDPR compliant.

ENHANCE GOVERNANCE

Establish clients’ governance practices prior to listing.

- Standardise your clients’ board meeting workflows and practices for regulatory compliance.
- Mitigate compliance risks via the presence of audit trails and implementation of strong internal board controls for document retention, data integrity, and board reporting.
- Track document approvals, upload board files, and retrieve archived meeting minutes for transparency and accountability.

SUSTAIN RELATIONSHIPS

Grow with your clients.

- Capitalise on the benefits of a scalable solution as pre-IPO clients go public.
- Gain client trust by improving the way the board and executives function.

