

Corporate Transaction Services

Change done right, with Epiq

We're your partner for information agent, exchange agent, paying agent, disbursing agent and transfer agent services — flawless delivery, superior service, full transparency, every time.

Exchange Offers
Tender Offers

Consent Solicitations
Treatment Elections

Rights Offerings
Mergers & Acquisitions

Private Security Issuances

900+ assignments, and counting.

We're an approved online agent with Depository Trust Company's Automated Tender Offer Program and Automated Subscription Offer Program.

One stop for all of your needs — our experts manage process administration from start to finish, or anything in between to best suit you.

What We Offer



Custom Intake, Automated Processing

Proprietary, online intake and screening platform
Automated Processing



Expedited Processing

Epiq-only streamlined transaction authority approval verification, and priority processing
Knowledgeable, attentive staff to walk you through every step of the process



Print and Noticing

2 million+ print copies, 2.4 million+ scanned images daily
Global reach



Call Center

900+ call center ready workstations; 2000+ inbound ports; 500 live toll-free phone trees
Fully integrated VOIP system for voice calls, emails, chats, faxes and SMS; onsite IVR facilities and recording studio



Strategic Communications

Messaging to manage a dialogue with constituents or otherwise achieve your goals

How We Work With You



Analyze and Plan

Comprehensive situation analysis
Ensure documents and procedures are workable
Battle-tested workflows and QA methods



Execute

Seamless interaction with you, stakeholders and clearinghouses
On-demand responsiveness and expedited processing
Flawless tracking, verification, record keeping, tabulation and distribution



Report

Complete transparency
Clear, timely, accurate reporting



Hosting and Security

Your data is always safe
Data centers exceeding Tier IV standards; redundant equipment; 24/7/365 monitoring



Contact

Noah Ornstein, Managing Director
P 312-971-3474 E nornstein@epiqsystems.com