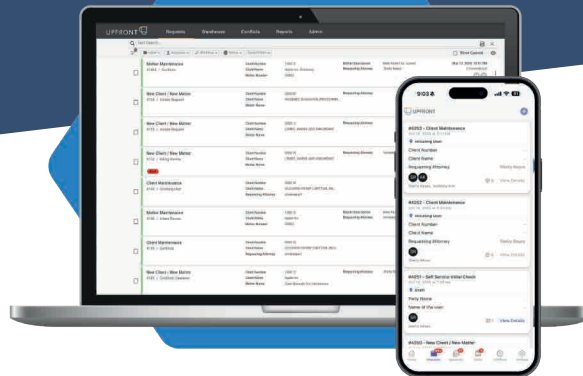




UPFRONT™



Delivery Partner:
dun & bradstreet

The Upfront™ NBI & Conflicts solution helps firms onboard clients and matters faster, **reduce manual effort**, and make better decisions with fewer resources. With intelligent workflows, AI-supported insights, centralized data, and built-in compliance tools, firms gain a **single, scalable platform** that strengthens intake quality, reduces operational cost, and keeps risk management aligned with regulatory and client expectations.

MODERNIZING NEW BUSINESS INTAKE & FIRMWIDE RISK – ALL IN ONE PLATFORM

- ▶ Streamlines client and matter onboarding while improving data quality, compliance, and turn-around time.
- ▶ Delivers fast, context-rich conflict results with advanced search capabilities that enhance decision-making.
- ▶ Centralizes conflicts, sanctions, AML, D&B corporate tree data, OCG/terms review, ethical screens, and lifecycle workflows, reducing reliance on multiple systems and minimizing manual steps.
- ▶ Automated routing and form intelligence increase accuracy while reducing administrative overhead.
- ▶ Empowers risk and intake teams to adapt processes quickly without development cycles, keeping firms agile as regulations and businesses needs evolve.
- ▶ Includes configurable processes for lateral hires, departing attorneys, client/matter maintenance, supplemental parties, and more.



Intelligent Intake & Usability

- Registration on Any Device
- Robust Form & Workflow Builder
- Intelligence Labels & Tagging
- Centralized OCG, Terms, & Ethical Screens Management



Decision Support & Risk Intelligence

- Advanced Conflict Search & Review
- Context-Rich Risk Indicators
- Global Sanctions, AML & Corporate Tree Visibility



Integrated Operations & Specialty Workflows

- Detailed, Customizable Reporting
- Microsoft Teams Integration
- Lateral Hire & Departing Attorney Workflows
- Consolidated, All-in-One Risk Platform