



StateFilings.com

PERR 
KNIGHT



- + Digital Transformation of State Filings processes
- + Licensable Cloud-based Software
- + Leverages Perr&Knight's decades of experience with State Filings
- + 2-Way Integration with SERFF
- + Flexible and Customizable System
- + Filing Project Management Tool
- + Data stored in SOC 1 Type II, SOC 2 Type II, ISO 27001 data center
- + Continuously Enhanced and Improved

By the Numbers

19 YEARS IN USE

\$30,000,000+
DEVELOPMENT INVESTMENT

8
YEARS
LICENSED

**SFC
LICENSEES**

3 TOP 10
P&C GROUPS
8 TOP 40
P&C GROUPS

20% OF ANNUAL U.S.
P&C DWP FROM
SFC LICENSEES

1,000,000+
FILINGS PROCESSED ON SFC

64,000+ FILING PROCESSED
ON SFC IN 2022

20% OF ALL P&C SERFF FILINGS
PROCESSED ON SFC IN 2022

Benefits



Increases Efficiency

- + Activity Manager
- + Multi-Filing Actions
- + Cloning



Reduces Regulatory Risk

- + Centralized Location for Filings
- + Form and Rule Libraries
- + Automatic Reminders



Provides Better Insights

- + Searches/Data Mining
- + Workflow Metrics
- + Maps, Dashboards and Reports



Best in Class Security

- + SOC 2 Type II Certified
- + Data Protected by CrowdStrike
- + Pro-active 3rd Party Penetration Testing

Other Features



Calendar

Plan annual filings
Objection due dates
added automatically



Communications

Automated E-mails
E-mail Directly from SFC
Teams Messaging



Integrations

Transfer form data via API
Web Hooks
JIRA and other software

The screenshot shows a calendar interface for March 2023. Overlaid on the calendar is a modal window titled "Add New Event". The modal contains the following fields:

- Event Name***: A text input field containing "Annual Report Filing".
- Event Date***: A date input field showing "03/17/2023" with a calendar icon to its right.
- Event Tag(s)**: A dropdown menu with a tag labeled "Annual" and a close icon (X).

At the bottom of the modal are two buttons: "Cancel" and "Create".

SERFF Push Integration – Improvements to SERFF



Clone Filings



**Split/Combined
Filing Logic**



**Add Templates
to Multiple filings**



**Note to Reviewer
Templates**



**Send a Note
to Reviewer on
Multiple Filings**



**Automatic
Notifications**

← Back to Project Details

Clone Template Apply to Filings

TEMPLATE DETAILS

Template Name: Sample Template

State: AK, MO, VT

Filed Type: Forms

Name

Name 1

Apply to Filings

| <input type="checkbox"/> | Company Tracking Number | State | Filing Type |
|--------------------------|-------------------------|-------|-------------|
| <input type="checkbox"/> | 2023-03-0002 | AK | Forms |
| <input type="checkbox"/> | 2023-03-0002 | AR | Forms |

Log Filing Activity

Subject (Required)

Extension Request

Comments (Required)

Thank you for your review of this filing. The company respectfully requests an extension of an additional week in order to fully address your concerns. Kindly advise if this request is acceptable. If so, please include the new response due date.

Back

Submit

Cancel