



# Data Identification Manager

*Supported Document Types*

# Document Types List

## Agreements

Accession Agreement	Closing Agreement	Exchange Rights Agreement
Adoption Agreement	Composite Signature agreement	Exclusivity Agreement
Advisor Agreement	Confidentiality Agreement	Executive Agreement
Advisory Agreement	Consent Agreement	Finder's Fee Agreement
Advisory Board Agreement	Consultant Agreement	First Loan Modification Agreement
Agency Agreement	Contribution Agreement	Founder Agreement
Agency Agreement Amendment	Contribution Agreement Amendment	Founder Vesting Agreement
Agent Agreement	Conveyance Agreement	Franchise Agreement
Agreement to be Bound	Co-Tenancy Agreement	General Security Agreement
Amalgamation Agreement	Counterpart to Purchase Agreement	Gifting Agreement
Ambassador Agreement	Deposit Trust Agreement	Grant Agreement
Amending Agreement	Development Agreement	Grant Agreement Amendment
Amendment to Employment Agreement	Director Agreement	Guaranty and Security Agreement
Arrangement Agreement	Distributor Agreement	Incorporation Agreement
Arrangement Agreement Amendment	Distributor Agreement Amendment	Indemnification Agreement
Asset Acquisition Agreement	Employment Agreement	Indemnity Agreement
Asset Purchase Agreement	Employment Agreement Amendment	Independent Contractor Agreement
Assignment Agreement	End User License Agreement	Intellectual Property Agreement
Assumption Agreement	Escrow Agreement	Intellectual Property Security Agreement
Banking Agreement	Evaluation Agreement	Intercreditor Agreement
Client Services Agreement	Evaluation Agreement Amendment	Interlender Agreement

# Document Types List

Investor Rights Agreement	Management Incentive Agreement	Relocation Agreement
IP Agreement	Manufacturing Agreement	Renewal Agreement
IP Assignment Agreement	Manufacturing Agreement Amendment	Rental Agreement
ISP Agreement	Master Acquisition Agreement	Repurchase Agreement
Joinder Agreement	Master Service Agreement (MSA)	Reseller Agreement
Joinder to Intercreditor Agreement	Merger Agreement	Restricted Stock Agreement
Joint Venture Agreement	Non-Competition Agreement (non-competition)	Retainer Agreement Letter
Lease Agreement	Non-Disclosure Agreement	Rider to Agreement
Lease Assignment Agreement	Officer Agreement	Rollover Agreement
Lease Termination Surrender Agreement	Operating Agreement	SAAS Agreement
License Agreement	Option Agreement	Sales Agent Agreement
License Agreement Amendment	Option Settlement Agreement	Section 85 Agreement
Limited Liability Partnership Agreement	Partnership Agreement	Secured Loan Agreement
Limited Partnership Agreement	Payment Agent Agreement	Secured Loan Agreement Amendment
Linking Agreement	Postponement Agreement	Security Agreement
Loan Agreement	Priorities Agreement	Security Postponement Agreement
Loan Agreement Amendment	Purchase Agreement	Separation Agreement
Loan and Security Agreement	Purchase Agreement Amendment	Service Agreement
Lock-Up Agreement	Purchase and Sale Agreement	Service Agreement Addendum
Maintenance and Support Agreement	Referral Agreement	Service Level Agreement
Maintenance Services Agreement	Registration Rights Agreement	Services Agreement Amendment
Management agreement	Release Agreement	Settlement Agreement

# Document Types List

Share Exchange Agreement	Stock Option Plan Agreement	Termination Agreement
Share Pledge Agreement	Stock Purchase Agreement	Termination of Agreement
Share Purchase Agreement	Stock Repurchase Agreement	Termination of InterCreditor Agreement
Share Repurchase Agreement	Stock Restriction Agreement	Termination of Shareholders Agreement
Shareholder Repurchase Agreement	Stockholder Agreement	Transfer Agreement
Shareholders Agreement	Sublease Agreement	Underwriting Agreement
Shareholders Agreement Addendum	subordination Agreement	User Agreement
Shareholders Agreement Amendment (shareholder)	Subscription Agreement	Vesting Agreement
Simple Agreement for Future Equity (SAFE)	Subscription Agreement Amendment	Voting Agreement
Software Maintenance Agreement	Supply Agreement	Voting Trust Agreement
Sponsorship Agreement	Support Agreement	Warrant Amendment Agreement
Stock Option Agreement	Support Structure Agreement	

## Communication

Acceptance Letter	Demand Letter	Fax Cover
Anniversary Letter	Direction Letter	Grant Letter
Approval Letter	Disclosure Letter	Letter
Audit Letter	Email	Letter of Intent
Comfort Letter	Employment Letter	Letter of Offer
Consent Letter	Engagement Letter	Letter of Reference
Cover Letter	Estoppel Letter	Letter of Transmittal
Cover Sheet	Exclusivity Letter	Letter of Understanding

# Document Types List

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Letter of Undertaking	Presentation	Retainer Letter
Management Rights Letter	Press Release	Settlement Letter
Opinion Letter	Promise to Pay Letter	Side Letter
Payoff letter	Representation Letter	Termination Letter
Payout Letter	Requisition Letter	

## Administration

Annual Report	Employee Leave Policy	Policies
Business Plan	Meeting Minutes	Timesheet
Code of Conduct	Memo	
Employee Handbook	Organizational Chart	

## Financial Documents

Amortization Schedule	Contract	Interest Statement
Annual Return	Contract Amendment	Invoice
Balance Sheet	Credit Card Statement	Pay Statement
Bank Act Report	Expense Report	Pay Stubs
Bank Act Search	Expenses Policy	Payroll Remittance
Budget	Financial Statement	Quote
Cashflow	General Ledger	Statement of Account
Cheque Requisition	Income Reports	Statement of Adjustments
Consulting Contract	Income Statement	T4

# Document Types List

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Tax Return

Trust Ledger

## Corporate Documents

Appearance Release

Deed

Information Sheet

Application for Authorization

Discharge

Insider Trading Policy

Application for Incorporation

Disclosure Policy

Inspection Report

Application for Membership

Disclosure Schedule

Insurance Policy

Application for Registration

DTA Report

Intellectual Property  
Assignment

Assignment

Due Diligence Checklist

Investor Warrant

Bill of Sale

Due Diligence Request List

IP Assignment

Capitalization Table

Easement

Lease

Charter

EFT Statement

Lease Amendment

Closing Book Index

EFT Summary

License Renewal

Closing Record Index

Employment Contract

Material Change Report

Compensation Plan

Employment Offer

Memorandum of  
Understanding

Conflict Search

Environmental Assessment

Minute Book Receipt

Convertible Note

Executive Summary

Motion Record

Corporate Profile

Form of Release

Motion Ruling

Corporate Status Report

Forms Filed

New Client Check Sheet

Corporate Summary

General Liability Policy

Notice of Assessment

Counterpart

Holdback

Notice of Change

Debenture Conversion

Information Circular

Notice of Conversion

# Document Types List

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Notice of Exercise	Registration Rights Amendment	Tarion Reports
Notice of Meeting	Replacement Warrant	Tax Loss Schedule
Notice of Private Placement	Representations and Warranties	Tax Receipt
Notice of Reassessment	Request for Proposal	Term Sheet
Notice of Registration	Requisition for Wire Transfer	Treasury Direction
NUANS Report	Resignation	Treasury Direction Policy
Offer to Lease	RFP Response	Treasury Order
Offer to Purchase	RFPQ Response	Trial Balance
Option Grant	Right of First Refusal	Trust Report
Past Due Notice	Short Form Prospectus	Trust Statement
Payment Direction	Signature checklist	Undertaking
Pleadings	Signature Package	Verification of Statement
PPSA Search	Signature Page	Warrant
Profit and Loss Statement	Specification Sheet	Warrant Exercise
Promissory Note	Statement of Claim	Warrant Indenture
Promissory Note Amendment	Statement of Defense	Warrant to Purchase
Proposal	Statement of Loss	Warrants to schedule
Prospectus	Statement of Registration	Warranty
Quarterly Assessment	Statement of Work	Wire Instructions
Receipt of Funds	Statutory Declaration	Writs of Execution
Record of Employment	Structure Diagram	

# Document Types List

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## Governance

Annual Resolution	Employee Stock Purchase Plan	Shareholder Consent
Articles of Amalgamation	Issuance Resolution	Shareholder Ledger
Articles of Amendment	Officer Register	Shareholder Register
Articles of Dissolution	Omnibus Resolution	Shareholder Release
Articles of Incorporation	Organizational Resolution	Shareholder Resolution
Board Consent	Organizing Resolution	Stock Option Grant
Board Meetings	Payroll Register	Stock Option Plan
Board Resolution	Post Amalgamation Resolution	Stock Option Register
CFO Certificate	Post Continuance Resolution	Stock Transfer Form
Circular Resolution	Resolution	Stockholder Consent
Director Consent	Securities Register	Transfer Register
Director Register	Share Provision	Transfer Resolution
Director Resolution	Share Provision Amendment	Trustee Resolution
Dividend Resolution	Share Terms	Warrant Register
Employee Stock Option Plan	Share Transfer	

## Legal

Affidavit	Litigation	Terms of Use
Consent & Waiver	Power of Attorney	Trademark
Consent to Act	Terms Conditions	Waiver and Consent
Legal Opinion	Terms of Service (ToS)	Waiver and Release





# Document Types List

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Waiver of Audit	Waiver of ILA	Wills
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## Certifications

Back up Certificate	Certificate of Incumbency	Indemnification Certificate
Borrower Certificate	Certificate of Interim Filings	Officer's Certificate
Bring Down Certificate	Certificate of Status	Option Certificate
Certificate of Amendment	Certificate of Withdrawal	Release Certificate
Certificate of Attestation	Closing Certificate	Rights Certificate
Certificate of Authentication	Composite Certificate	Secretary Certificate
Certification of Compliance	Corporate Certificate	Share Certificate
Certificate of Incorporation	Drawdown Certificate	