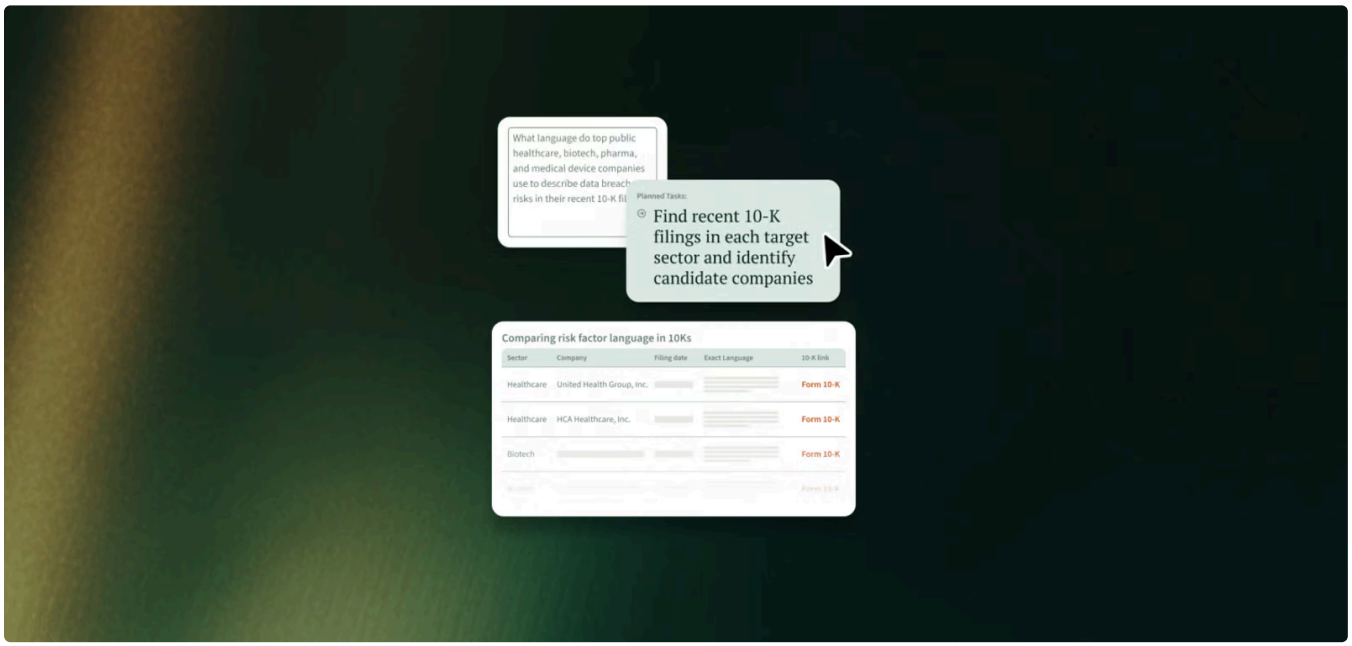
SEC filings now available and queryable in Vincent

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With Vincent by Clio, large law firms and legal teams can surface disclosures and drafting precedent from a full body of SEC content

Corporate filings hold some of the most important information in business, showing how companies manage risk, structure deals, and make decisions. Yet the way legal teams work with that information has barely changed in decades. They still open filings one by one, sift through unstructured documents, and manually piece together insights.

Today, Clio is changing that.

We've launched a new workflow in Vincent that enables legal teams to explore SEC corporate filings from EDGAR using natural language. Lawyers can now ask questions across more than 30 years of corporate disclosures and legal agreements and receive structured, source-grounded answers in seconds.

Instead of reviewing filings individually, teams can search and synthesize across the full body of SEC content, transforming how filing research gets done. Because this capability is natively integrated within Vincent, legal teams can move seamlessly from research to analysis to drafting in a single environment, keeping insights connected to the broader context of their work.

From documents to answers

For decades, the SEC's EDGAR database has been foundational to corporate and transactional legal work, housing annual reports, disclosures, and the agreements that underpin them. Traditional tools, and even more recent AI products, still return lists of documents that must be reviewed and interpreted.

Vincent takes a different approach.

It synthesizes insights across filings and delivers structured answers aligned with how legal teams actually work. Lawyers can retrieve and summarize company filings, surface key risk factors and financial metrics, and compare disclosures across companies and industries. They can also analyze how specific terms and provisions are used across comparable transactions.

Every response is grounded in the underlying filings, giving attorneys the confidence to verify and apply insights directly in their work.

Built for transactional and corporate work

Lawyers working on M&A, corporate governance, and regulatory matters rely heavily on filing data to understand deal structures and risk exposure. Vincent provides a faster, more scalable way to work with that information.

A key capability is the ability to search across thousands of legal agreements filed as exhibits and surface relevant drafting precedent. Legal teams can identify how specific clauses are used across comparable transactions and apply those insights to their own work, improving both speed and consistency.

"For many transactional attorneys and corporate legal teams, filing research has been one of the most time-intensive parts of their day," said Dan Hoadley, Senior Director of Product at Clio. "Now, you can go from a question to a grounded answer and immediately apply that insight in your work."

The workflow also brings new depth to how corporate legal departments and corporate development teams work with filing data. This includes benchmarking executive compensation, reviewing competitor disclosures, and analyzing sector trends using publicly available filings within the same workspace they use every day.

Content coverage and ongoing expansion

At launch, the new workflow includes annual reports, disclosures, and a growing set of transactional agreements filed as exhibits. The exhibit library represents a portion of the full dataset and will continue to expand through Q3, with additional content added on an ongoing basis.

The SEC corporate filings workflow is available starting today for Vincent customers, with additional filing types and expanded search capabilities expected later in 2026. For more information, visit clio.com/vincent.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.