Lexis Practice Advisor®
Quick Reference Guide

LexisNexis®

ALWAYS START ON POINT

PRACTICAL GUIDANCE BACKED BY EXPERTS

- Bankruptcy
- General Practice
- California Business & Commercial
- Capital Markets and Corporate Governance
- Commercial Transactions
- Corporate and M&A
- Corporate Counsel
- Finance
- Florida Business & Commercial
- Intellectual Property & Technology
- Labor & Employment
- New York Business & Commercial
- Real Estate
- Texas Business & Commercial

For more information:

LEXISNEXIS.COM/STARTONPOINT
800.628.3612

500+ ATTORNEY AUTHORS

14 PRACTICE AREAS

950+ SEARCHABLE DEAL POINTS

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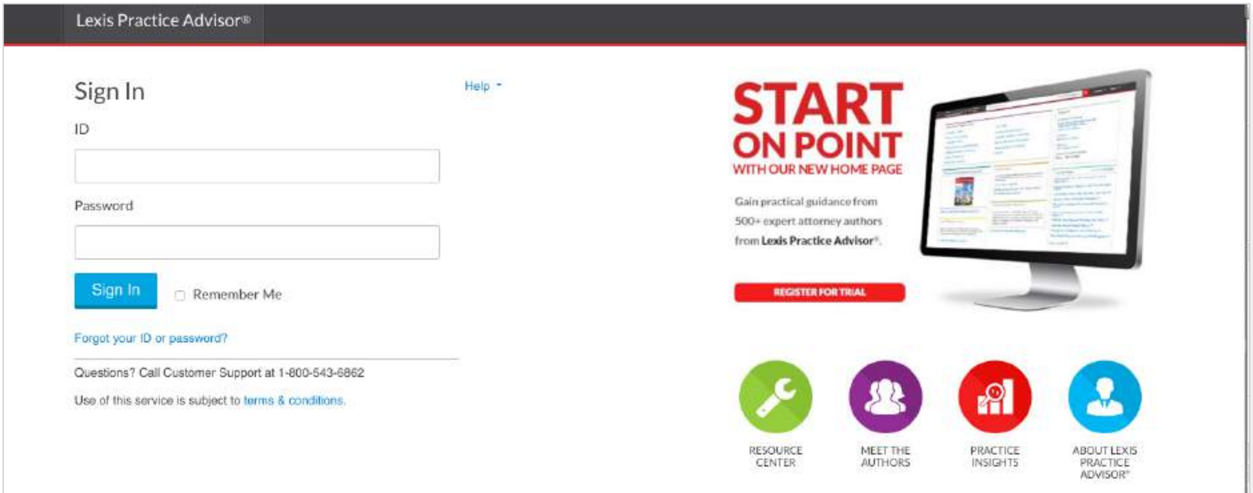
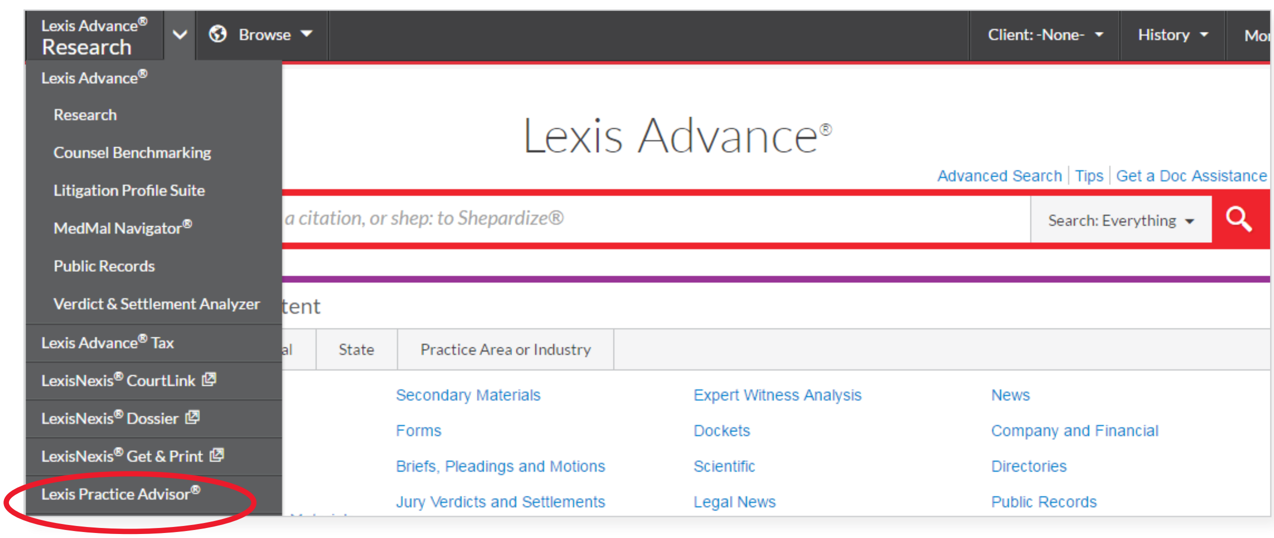
Direct Access and Sign In



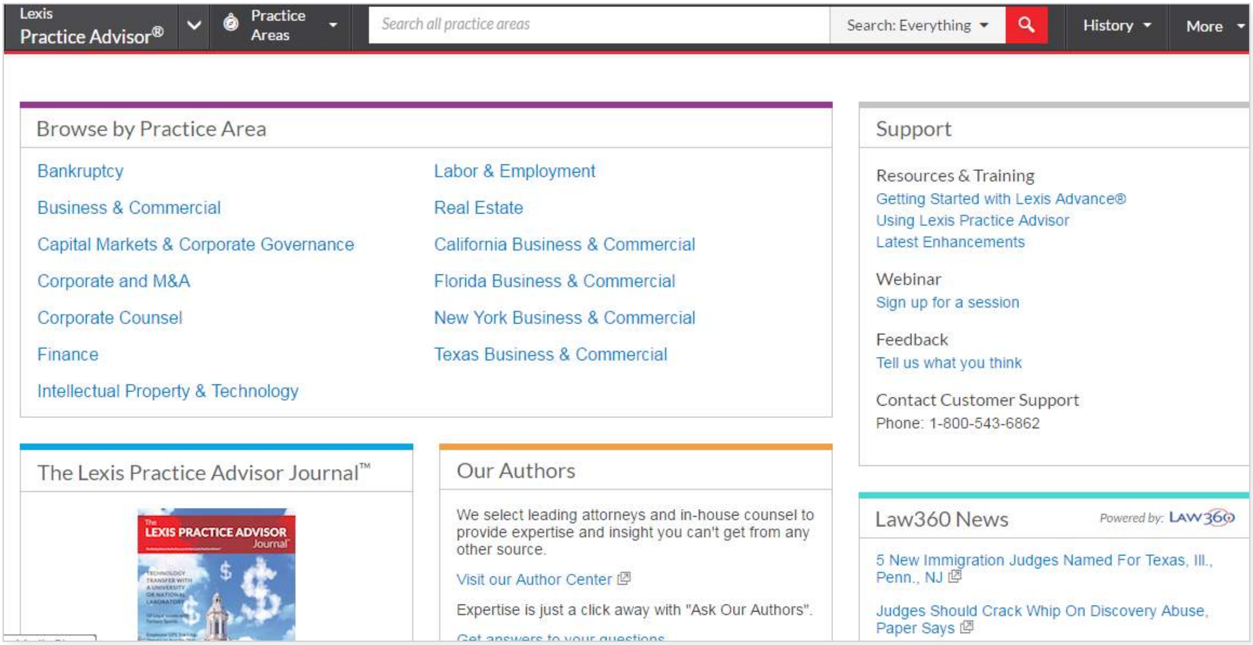
To use Lexis Practice Advisor®, go to www.lexispracticeadvisor.com and enter your user ID and Password. You also can sign in from the Lexis Practice Advisor Resource Center which offers support, training, tips, guides, videos and more.

Or Access Lexis Practice Advisor® from Lexis Advance®



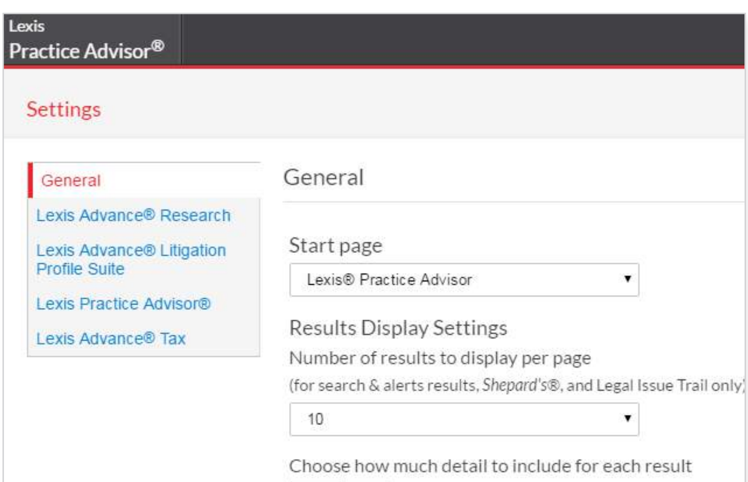
If you subscribe to both Lexis Advance and Lexis Practice Advisor services, access is now available from Lexis Advance. Just click on Lexis Practice Advisor® in the Lexis Advance® Research pull down available in the black bar at top left.

Lexis Practice Advisor Home Page on Lexis Advance



When you access Lexis Practice Advisor from Lexis Advance, you will see a home page similar to this. Click on the practice area you wish to access in **Browse by Practice Area** which lists the practice areas to which you subscribe. In addition, you will find a list of practice areas to which you have not subscribed (not shown here). However, you can still choose to explore their **Table of Contents** and descriptions of their content.

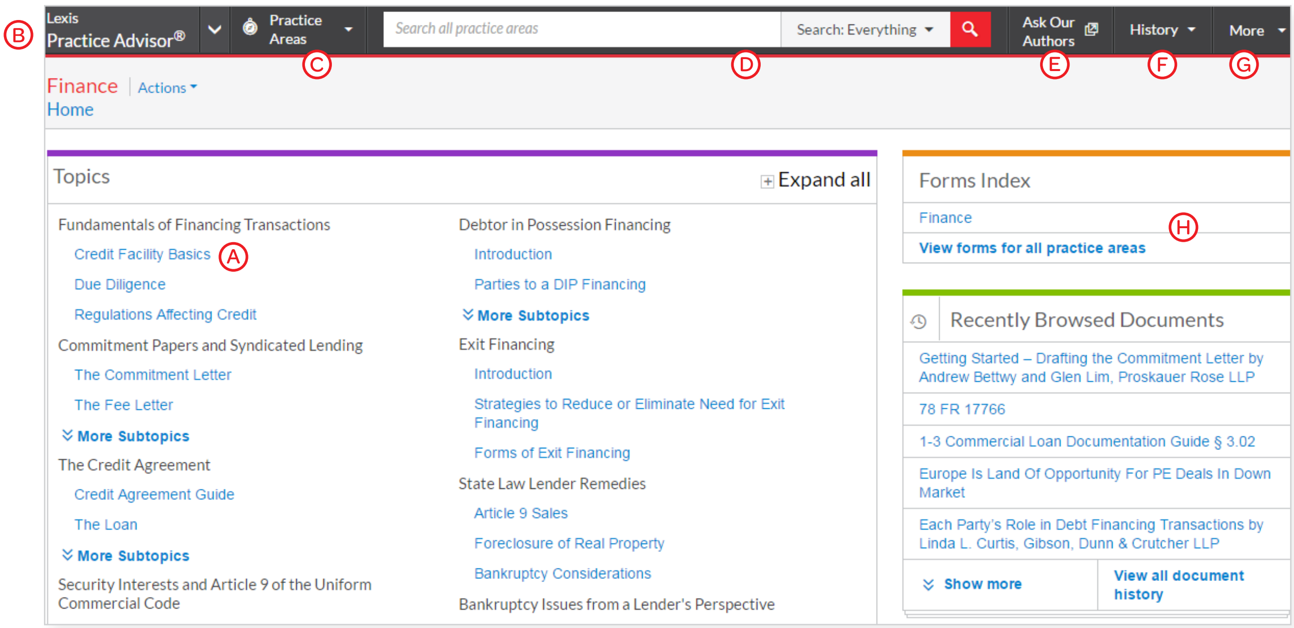
Settings



You also have the option to set up preferences under **Settings** under the **More** pull down at top right.

You can set Lexis Practice Advisor as your Start page, choose how your documents display and more.

Select Your Topic from the Practice Area Page



After selecting a practice area, you will arrive at a practice area landing page that provides a double-column menu of topics from which you can choose. On the right, you gain access to the **Forms Index, Recently Browsed Documents, Lexis® Market Tracker, Law360® headlines** (articles accessible with subscription) and **Meet Our Authors.**

Ⓐ Click on a blue topic link to find relevant information that can include **Forms; Practice Notes; Articles; Secondary Materials; Cases; Statutes & Legislation; Briefs, Pleadings & Motions; Administrative Codes & Regulations**; and more.

Ⓑ To return to the **Lexis Practice Advisor home page**, click the logo.

Ⓒ Move to other practice areas in your subscription.

Ⓓ Type in your search words and filter by practice area.

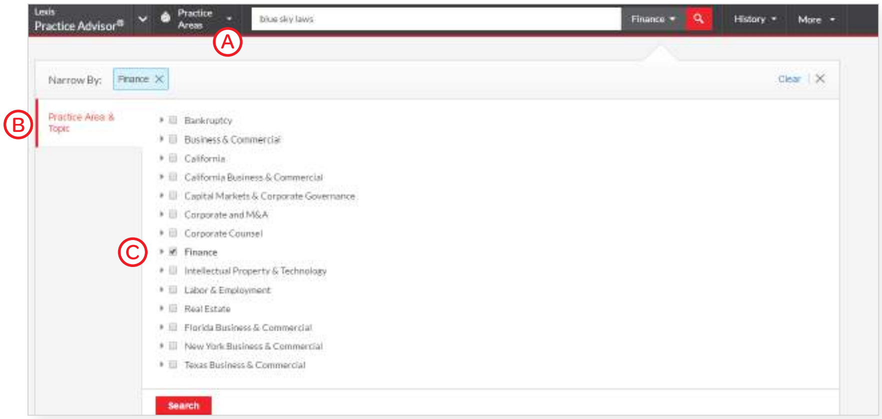
Ⓔ Need more information? Send a question via email to **Lexis Practice Advisor Authors**.

Ⓕ Return to recent searches or recently browsed documents. Also choose recent documents in the **Recently Browsed Documents**.

Ⓖ Access **Folders, Alerts, Notifications, Settings, Feedback, Help, Price Guide, Live Support, Sign-In Profile, *My Lexis*™ and Sign Out**.

Ⓗ Choose practice area forms or all forms available in Lexis Practice Advisor (even those outside your subscription). Forms can be filtered by type, including **Official Forms, Lexis Practice Advisor Authored Forms, Checklists, Sample EDGAR® Precedents and Briefs, Pleadings and Motions**.

Additional Ways to Select Topics



In addition to choosing a topic from your offering's home page, you can also browse and select from the **Browse Topics** table of contents. Here's how:

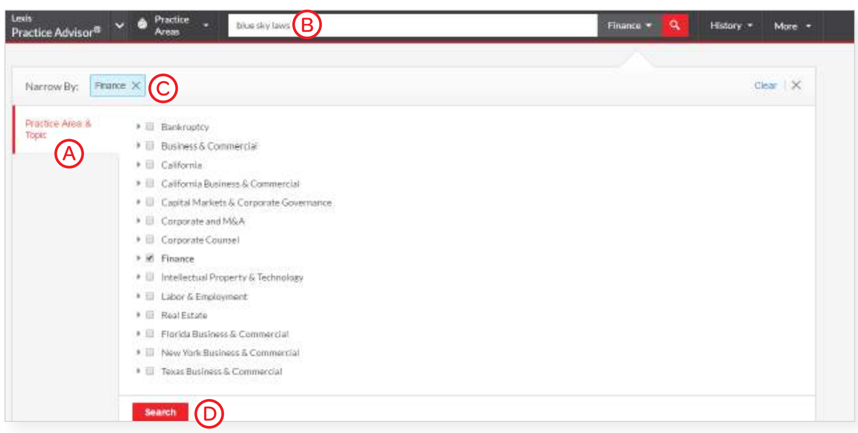
A Select **Practice Areas**.

B Select the **Topic Navigation** tab.

C Choose your practice area offering, e.g., **Finance**

D Browse and select a topic and view the subtopic underneath.

E Select your subtopic and move directly to results documents.



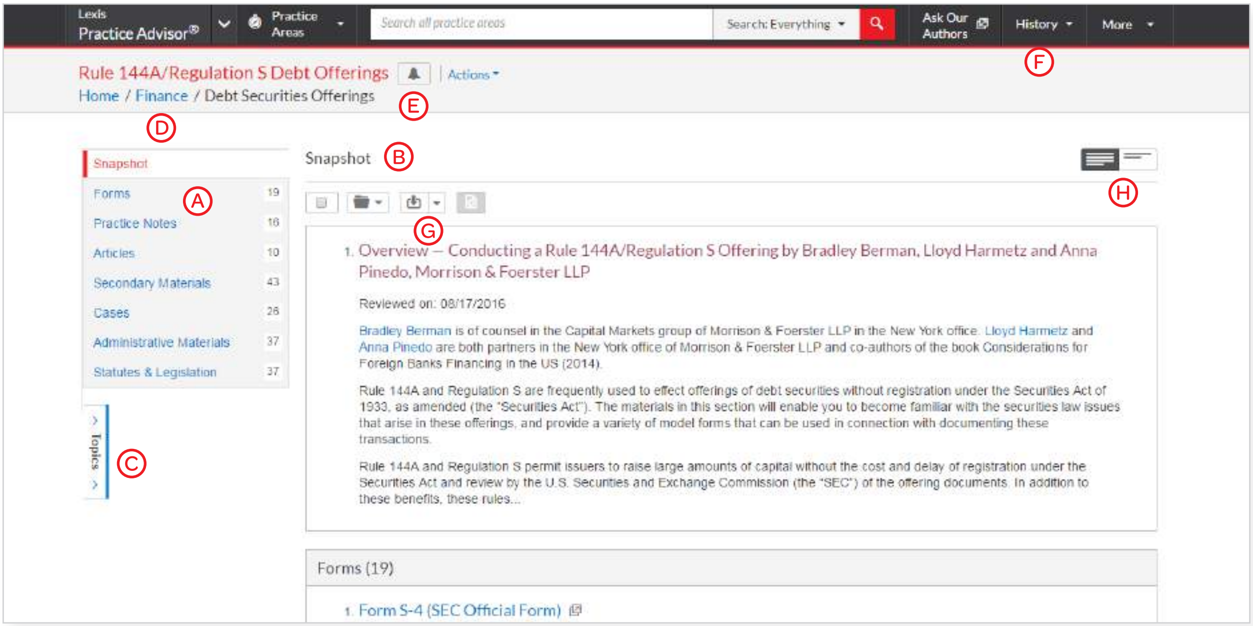
A You can **focus your search** using the Practice Area & Topic option.

B **Enter the words** you want to find in the search box on any screen, i.e. ENTER: blue sky laws.

C **As you add filters** across screens, the Narrow By box displays your filter choices. Click the X to delete a choice or Clear to remove all choices.

D Click **Search** to close the Filter box and run your search.

View Topic Results Selected from the Practice Area Home Page



When you browse and select a topic from the **practice area home page** (see Page 4)—or the **Browse Topics** table of contents—your results look like this:

Ⓐ Content types available in the results for your select topic are listed here and now may include **Articles; Briefs, Pleadings & Motions; and Administrative Materials**. Move among content types without tabs.

Ⓑ See the top results for each content category in the **Snapshot** view.

Ⓒ View all practice area topics and change subtopics if needed.

Ⓓ Quickly return to the practice area home page (e.g., select Finance).

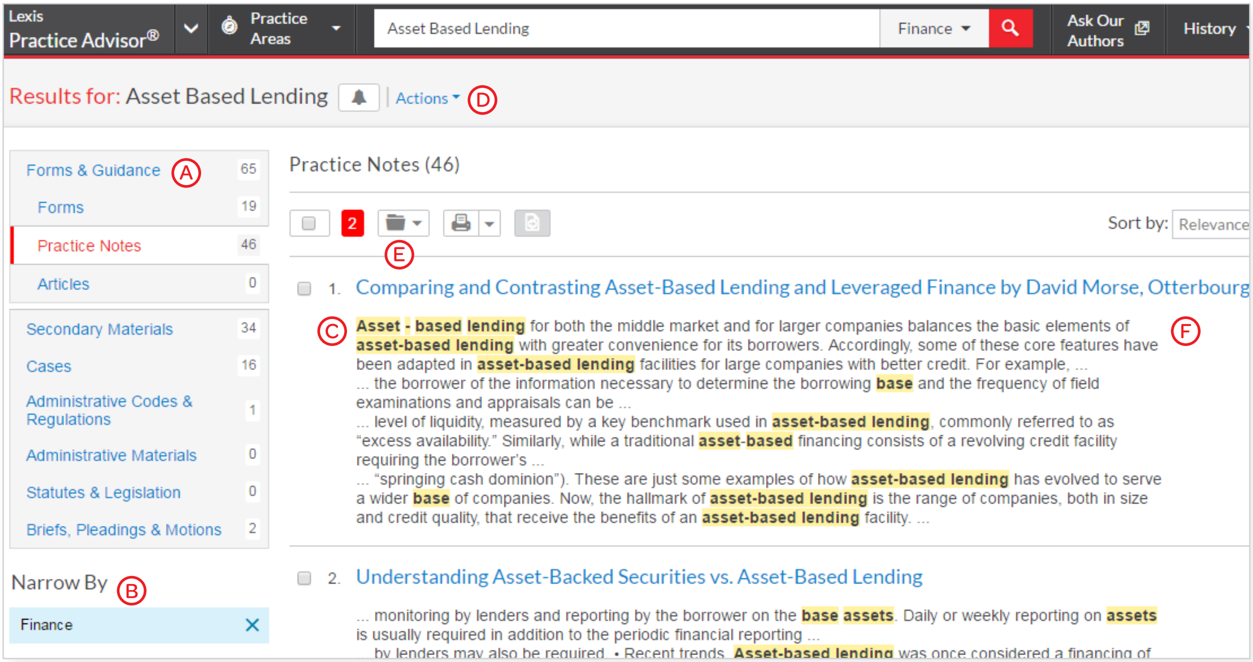
Ⓔ Set an **Alert** on a subtopic by clicking the bell icon and choosing what to monitor as well as delivery times.

Ⓕ Select **History** to quickly return to prior tasks.

Ⓖ Print, download or email documents without opening them. Also add documents to folders. Check the box next to the title and click a delivery option.

Ⓗ Choose to view results with a preview of text or without.

View Topic Results from a Search



When you enter a search (see Asset Based Lending in search bar above), the results are displayed like this:

Ⓐ Under **Forms & Guidance**, select the content type you wish to review and see the results at right. The number indicates the number of results for that content type.

Ⓑ Each content type offers different filters. Just click a filter to add. It displays in blue under **Narrow By**. To remove a filter, click the **X** in the blue box.

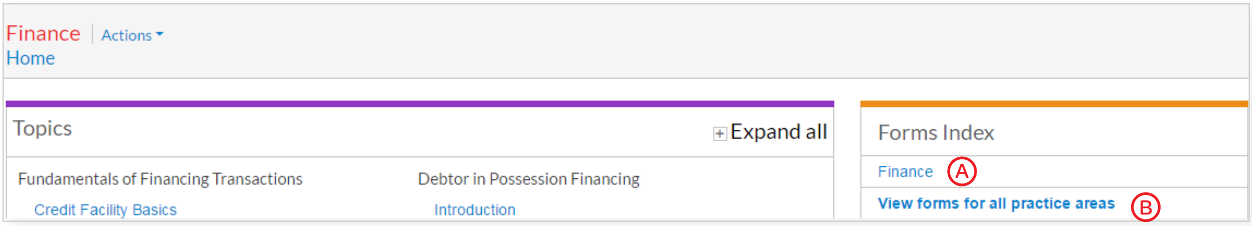
Ⓒ Your search words are bold and highlighted in yellow so you can quickly determine if the document is relevant. Click on the blue headline to see the complete document.

Ⓓ Change search options by selecting **Actions**, where you can run as a terms & connectors search, add legal phrases and more.

Ⓔ Deliver and share documents.

Ⓕ Keep track of documents viewed. The glasses icon (not shown) shows documents viewed over the last 30 days. Hover over the icon to see the last date viewed.

Forms Index Search

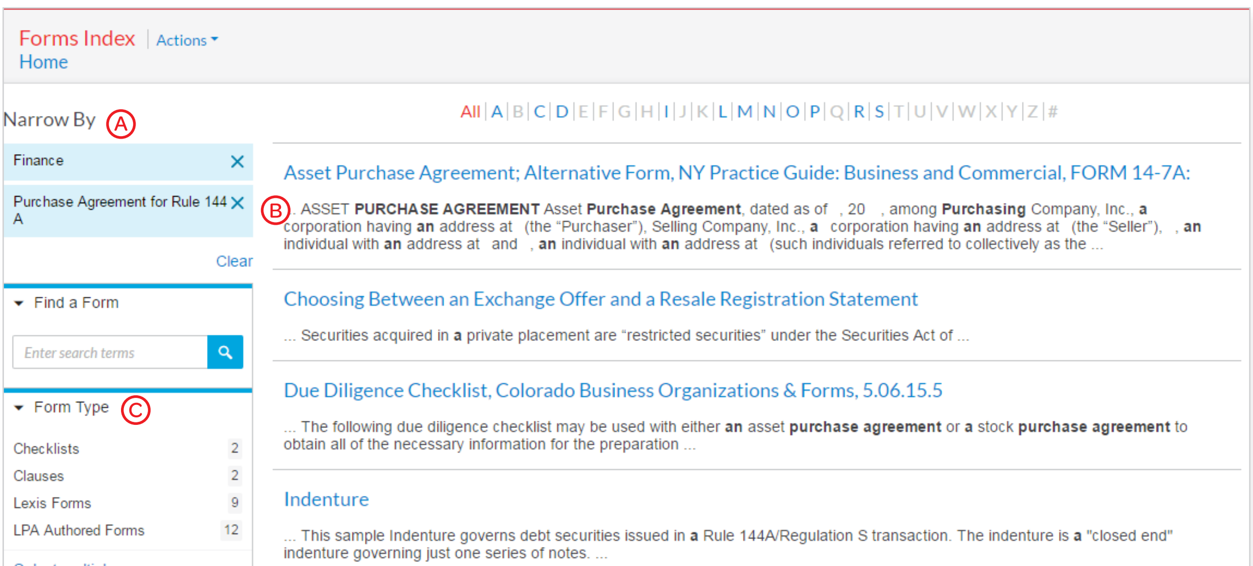


The **Forms Index** provides fast access to forms from your Practice Area Page

The **Forms Index** provides an alphabetized index of forms for your practice area.

View an alphabetized index of all forms available from Lexis Practice Advisor—including those outside your practice area and subscription.

Forms Index Search Results

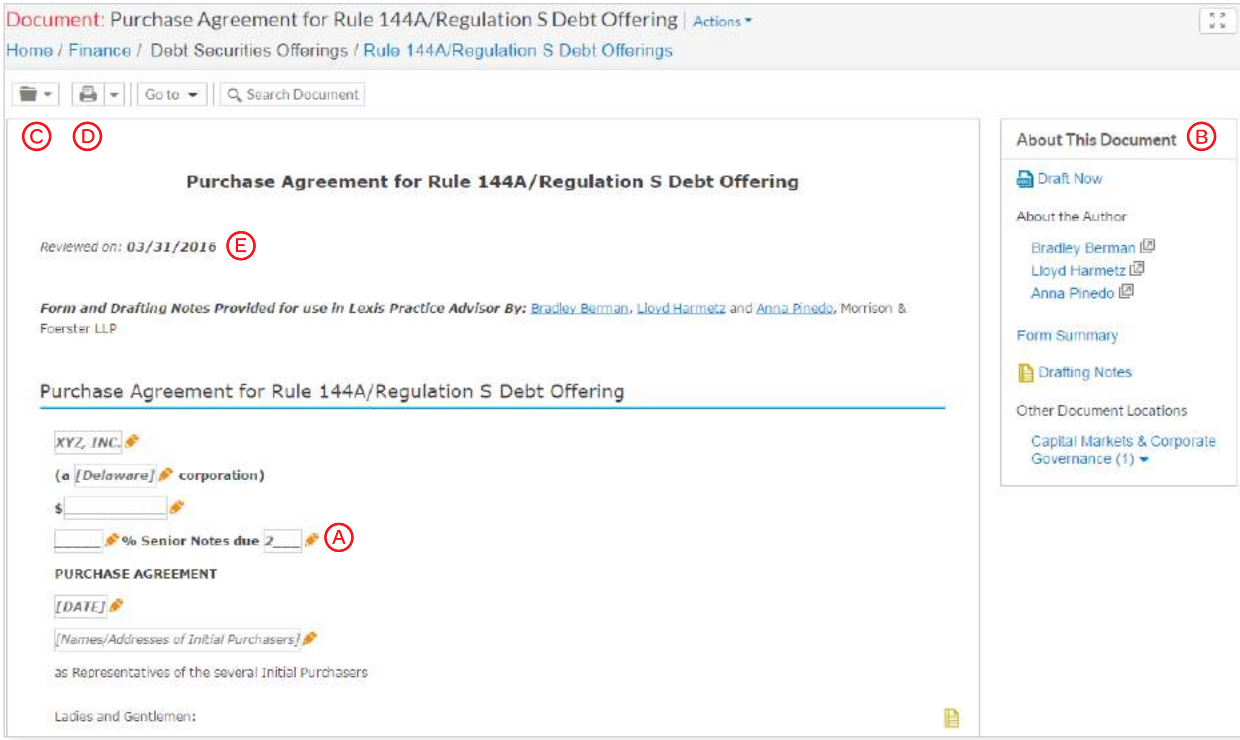


Ⓐ Post-search **Narrow By** filters are for form types found at Lexis Practice Advisor including Expert Forms and Checklists.

Ⓑ A preview description of each form is provided. You can also see preview descriptions for forms outside your subscription.

Ⓒ Filter results by **Form Type** including Lexis Practice Advisor Authored Forms, Official Forms, Checklists, Sample EDGAR precedents and Sample Briefs, Pleadings & Motions.

Using Forms



Work efficiently with editable forms that can be drafted online or downloaded and edited within programs you use every day. You can email, print or share with colleagues when you want to collaborate on a draft.

Ⓐ It's easy to draft online. The **pencil icon** highlights editable fields. Select a field and **add words** to the field provided and select Apply.

Ⓑ Under **About This Document**, you can click **Draft Now** to have the form delivered to you; learn the credentials of the attorney author(s) of the form under **About the Author**; view all **Drafting Notes** as one document; and see other locations for this form under **Other Document Locations**.

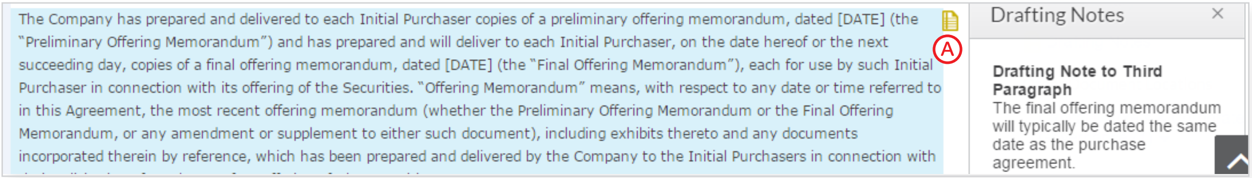
Ⓒ **Save forms to a Folder.** Open from the folder, draft and share with colleagues.

Ⓓ **Print, download, email or send documents to Dropbox®.**

Ⓔ **Be confident the form is current.**

Using Forms Continued—Drafting Notes

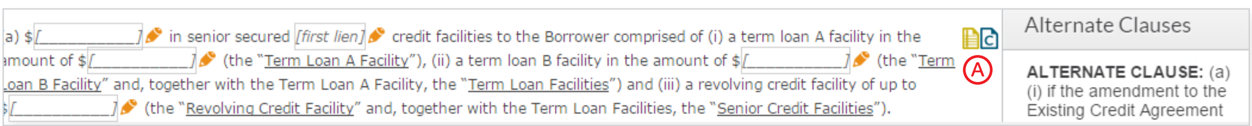
Get vital insights as you draft. Each drafting note provides you with practical guidance based on the attorney authors' experience.



Ⓐ Click the yellow "Drafting Notes" icons embedded in the form to find a drafting note relevant to the highlighted copy.

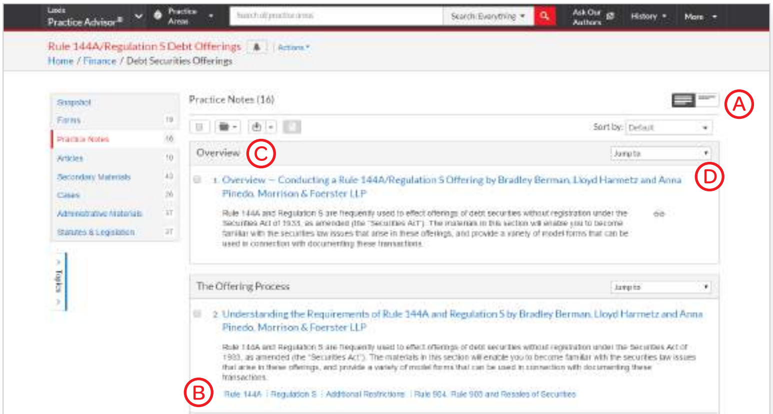
Alternate Clauses

Access alternate clauses right where you need them—embedded in the text of the form. They're also accessible under About This Document.



Ⓐ Click the blue C in the original clause to open up the Alternate Clauses box, review text and select.

Practice Notes



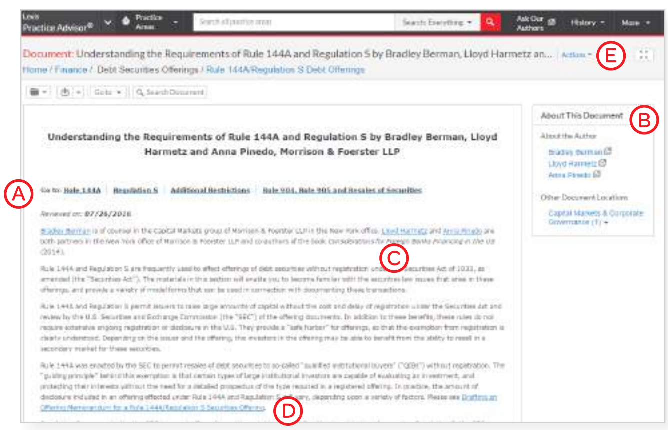
Find practical guidance written by practicing attorney authors in Practice Notes.

Ⓐ Choose to view results with only titles of documents displayed or with the title and a description of content to help you identify the documents and provisions you need.

Ⓑ Link to specific topics within a document from **subtopic links** below the document description.

Ⓒ **Results documents are organized** by your topic with the **Overview** document displayed first.

Ⓓ Quickly move to other relevant Practice Notes listed under **Jump to**.



Check out these helpful features in your open Practice Note.

Ⓐ Click these links to go directly to these topics within the Practice Note.

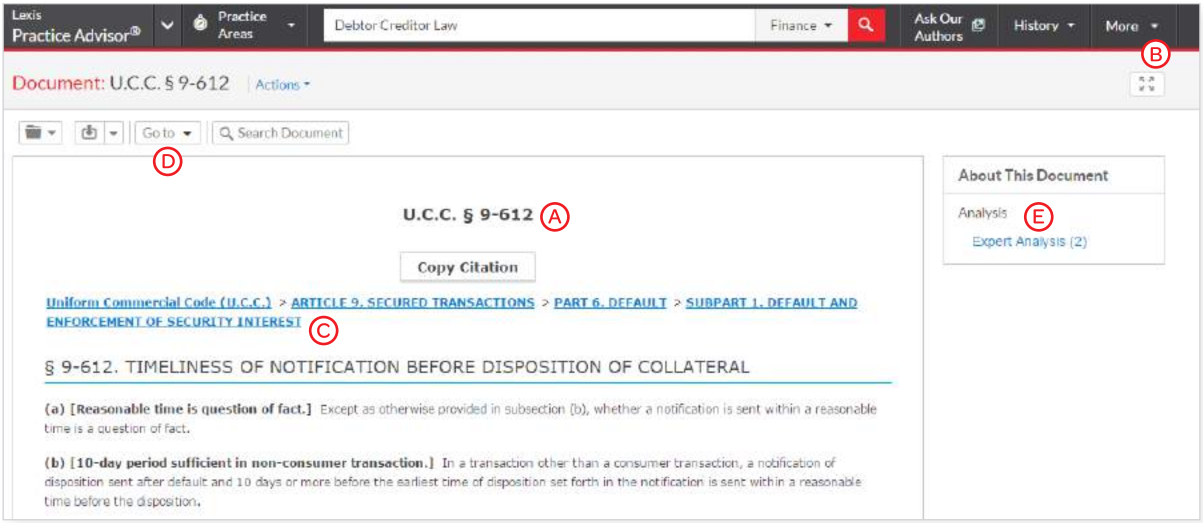
Ⓑ In **About This Document**, find links to related content.

Ⓒ **Find credentials of the document's attorney authors** to be confident in the practice notes' guidance. Use these links to review their credentials or go to About This Document and select their names.

Ⓓ **Link directly to highlighted authority.**

Ⓔ To return to your practice notes documents, select **History** then **Documents**. No tabs to manage!

Statutes & Legislation



Ⓐ View **Statutes and Legislation** that have been handpicked by experienced authors as the most relevant, up-to-date content.

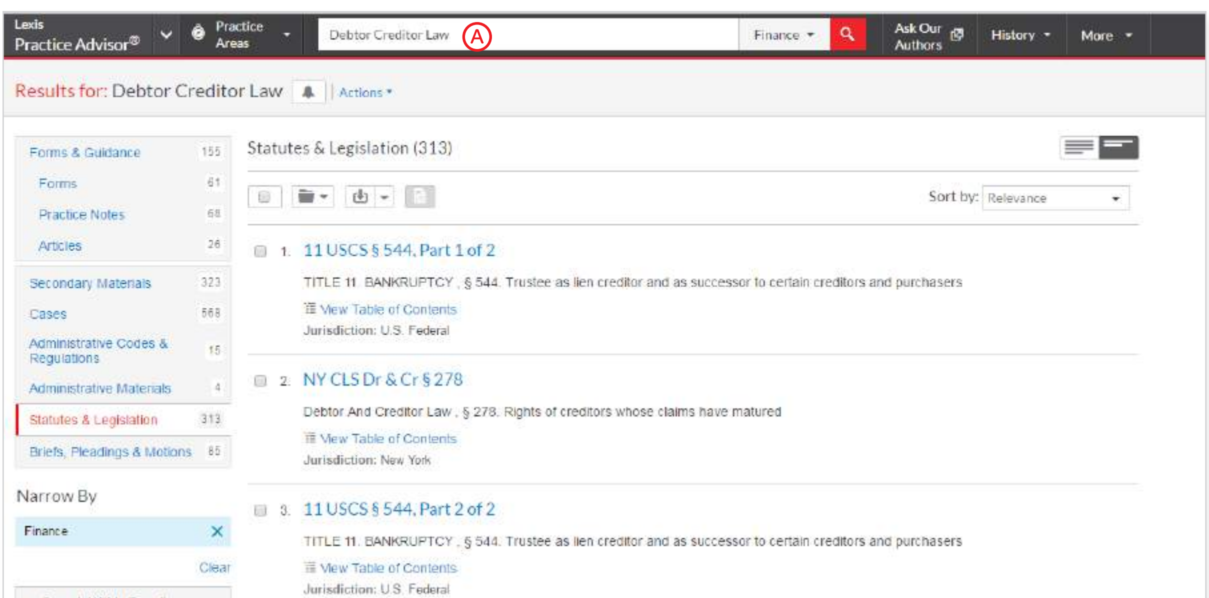
Ⓑ Set an **Alert** and receive updates.

Ⓒ Move to other sections of the code. Just select a link.

Ⓓ Choose a part of the document you wish to view under **Go to**.

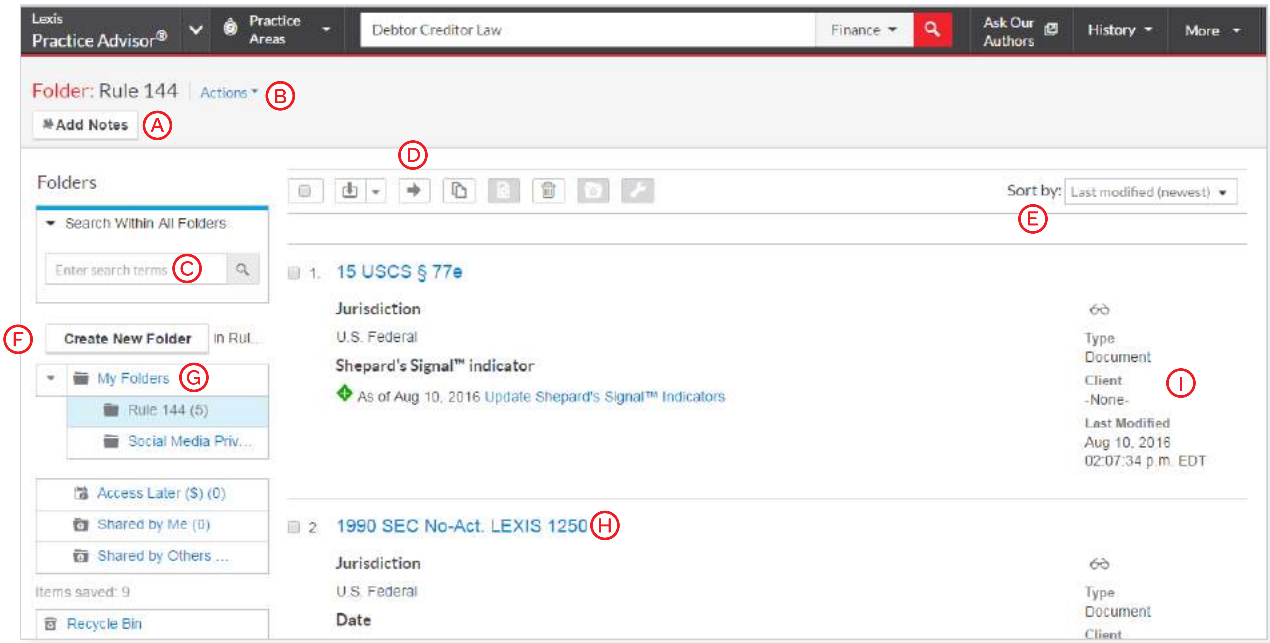
Ⓔ Explore related information under **About This Document** such as **Expert Analysis**.

Search by Statute or Citation Name



Ⓐ You may search a statute or citation by its popular name in the search bar and you will receive a results list to review.

Folders: Save Forms, Documents, Text, Searches and More



Gain access to your Folders by selecting Folders from the More pull-down menu at the top of most Lexis Practice Advisor screens. Copy and save selected document text, search results lists, documents and information even from other LexisNexis® products. Subscription documents stay in Folders until you remove them.

A **Add Folder notes**. Click and add up to 1000 characters.

B Click **Actions** to **Rename, Download, Move, Copy, Share** or **Delete** the Folder. You may also choose to update *Shepard's* Signal™ indicators.

C **Find vital facts across all Folders** and notes. Just enter your search words, (e.g., exemptions).

D Choose buttons at the top to **Select, Download, Move, Copy** or **Remove** folders.

E Organize folders under **Sort by** according to Last modified, Clients, Types or Titles.

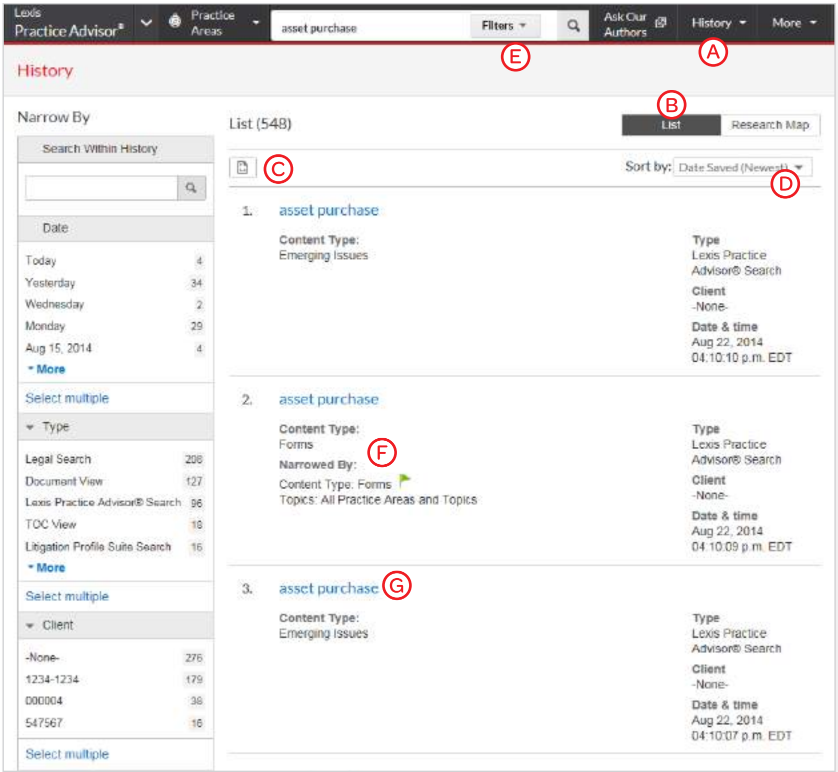
F **Create New Folder** allows you to create a new folder within My Folders or create a subfolder with a Folder.

G **Move among your Folders** here. Each Folder shows how many documents it contains.

H **Click a document listing** and look under **About This Document** to find information that may include the Document **Type, Date Saved, Last Updated, *Shepard's*® Citations Service** information and more.

I **Get notified of updates.** Documents you store in Folders are flagged when updates are available so you can retrieve them. (Not shown.) Also view shared documents.

History: View Documents, Searches and More



View search history for the past 90 days. View documents retrieved, prior searches and even tasks from Lexis Advance. **You can view your search history in a List view, or as a graphical Research Map.** Get interrupted during research? Pick up where you left off quickly by going to your History. Use your Search History to save useful searches to your Folders.

Ⓐ **Return to a search fast**. Select from the five most recent searches or documents. Click **History** in the black header. Link to your complete History list by selecting **View all history**.

Ⓑ The **List view** is the default view.

Ⓒ **Print your history.** Get a printer-friendly list of searches. Then click the Print button.

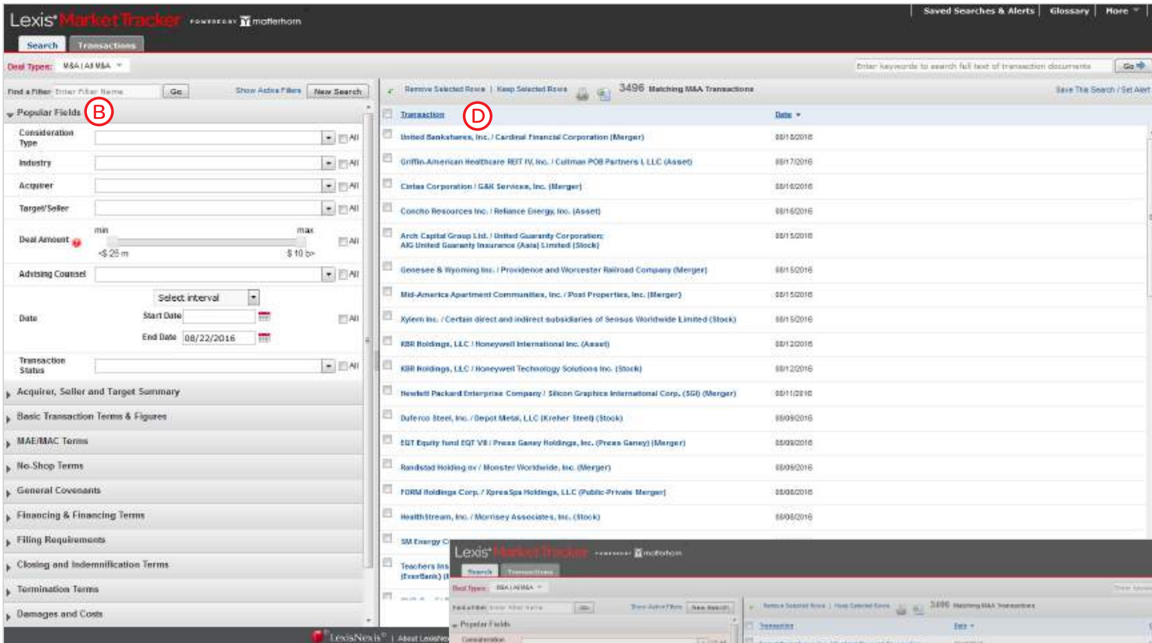
Ⓓ **Sort your history by date** (oldest or newest first), **type** or search **title** (alphabetical or reverse-alpha order).

Ⓔ **Filter history to display** by date, date range or tasks type, such as alerts created, forms viewed, emails sent, searches, etc. Only dates where research occurred are included. Just click a date, type, etc.; the filter **displays in blue under Narrow by**. To remove the filter, just click the X in the blue box.

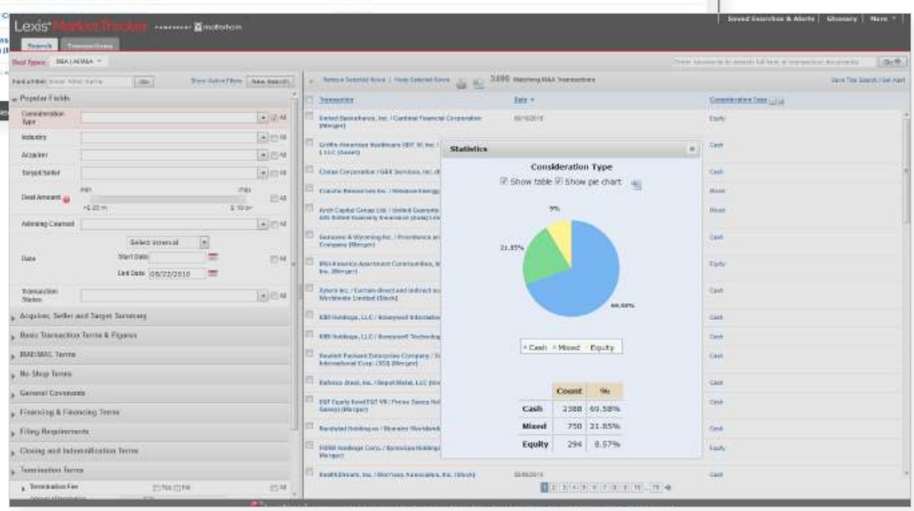
Ⓕ **See search details up-front**. Each listing provides a wealth of detailed information—content categories, document types, task type and date performed, and more.

Ⓖ **Return to a document or task**. Click the document or task title.

Lexis® Market Tracker



Home page



Transactional document

Lexis® Market Tracker, powered by Matterhorn, allows you to search, compare and analyze the latest deals, terms and provisions, so you can execute your Mergers & Acquisitions and credit transactions from a position of strength and negotiate deals with confidence. With Lexis Market Tracker you can:

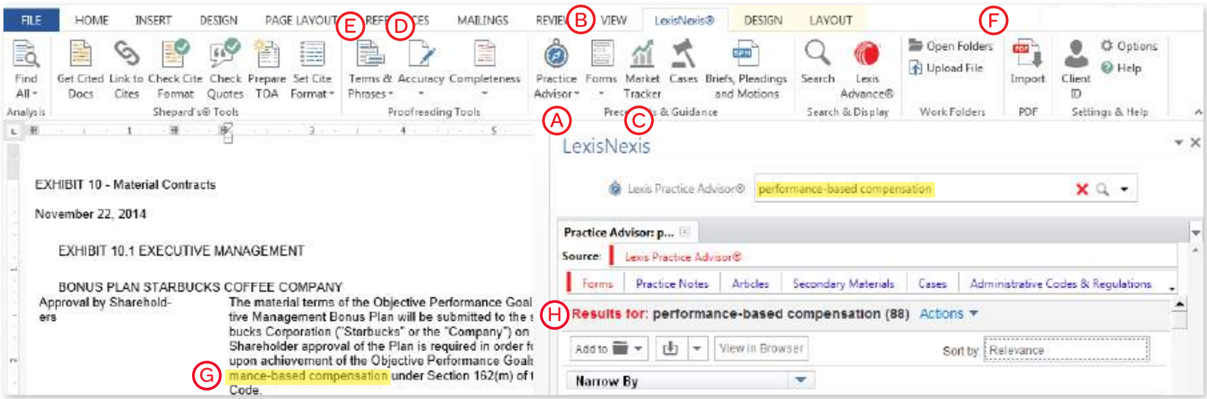
Ⓐ Search across 5,000 publicly filed transactions using over 1,400 deal points to find current deals that are similar to the deal at hand.

Ⓑ Use analytical capabilities to zero in on relevant deal terms and provisions to analyze market trends and language.

Ⓒ Quickly compare across deals to determine the best terms to negotiate for your client.

Ⓓ View deal documents that have been filed with the SEC and find specific language within them.

Lexis® *for* Microsoft Office® Toolbar with Lexis Practice Advisor



The steps you take in your work flow seamlessly together when you use the Lexis® *for* Microsoft Office® toolbar integrated with Lexis Practice Advisor. You gain access to on-point practical guidance where you need it most—from the Microsoft® Word document or Outlook® email you're working on.

In addition, you can find forms or deal information with Lexis Market Tracker from within your document. These tools are part of a wide range of drafting, review and research tools available from one toolbar that enhances your ability to work with efficiency and confidence.

Ⓐ To find on-point guidance and resources from Lexis Practice Advisor, highlight a term of interest in your Word document (or email) and click the **Practice Advisor** icon.

Ⓑ To access relevant annotated forms, highlight a term of interest and click the **Forms** icon.

Ⓒ To find related M&A or Financial deal analytics, highlight your deal term and click the **Market Tracker** icon.

Ⓓ To find and correct common mistakes, such as unpaired quotation marks or parentheses, click **Accuracy**.

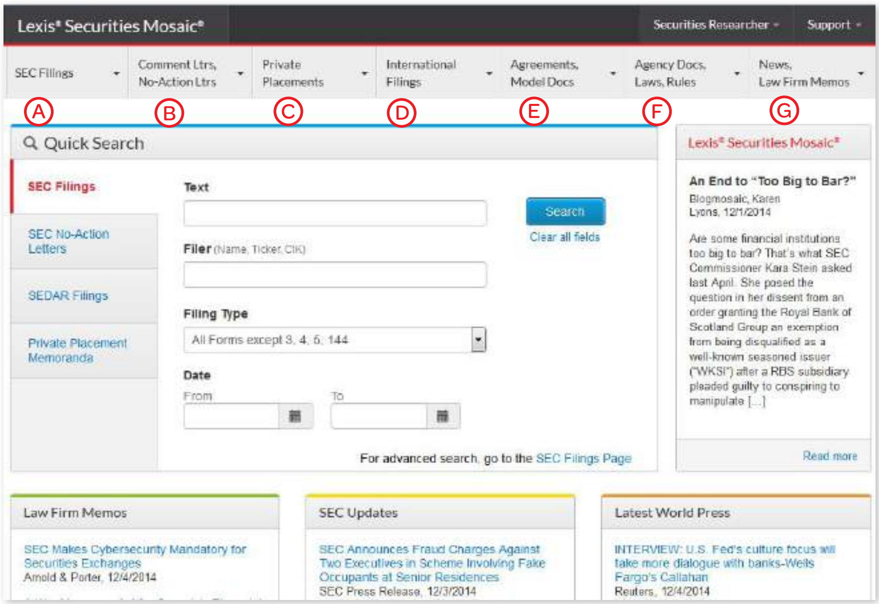
Ⓔ To validated defined terms and check references to documents and legislation, click the **Terms & Phrases** icon.

Ⓕ To convert PDFs to Word Documents in seconds, click the **Import** icon.

Ⓖ Choose the phrase in your document you wish to search and click **Practice Advisor** in the toolbar.

Ⓗ Review results for "practice-based compensation" in the right pane.

Lexis® Securities Mosaic®



Lexis® Securities Mosaic® resources deliver real-time securities and SEC information, as well as industry news, research, guidance and current awareness on matters related to federal regulation and disclosure. Our breadth of content and innovative technologies give you access to powerful government and securities data to help you make more strategic decisions.

- Stay on top of federal government policy and judicial decisions.
- Track companies, law firms, lawmakers and rule makers across myriad sources.
- Monitor enforcement activity and business disclosures with precision.
- Follow business deals and transactions.

Ⓐ **SEC Filings**—Our complete collection of SEC EDGAR filings is updated in real time. Use robust search fields at the filing and company levels, which complement full Boolean and relevance text search capabilities.

Ⓑ **Comment Letters, No-Action Letters**—With our SEC Comment Letters search page, you can filter by industry, location and the form type of the subject filing. View all letters in a related comment letter thread and generate a single PDF that consolidates them.

Securities Mosaic® also boasts nearly 70,000 full-text searchable no-action letters that span more than 40 years (over 10 times what you'll find on sec.gov!). The new SEC No-Action Letters Advanced Search feature gives you dedicated and powerful access to this collection, providing you with valuable SEC staff positions and analysis.

Ⓒ **Private Placements**—Private Placement Memoranda provides you with an extensive database of valuable private offerings under Rule 144A, Reg S and Reg D. This collection, updated regularly, helps you stay on top of the market and streamline your workflow to save valuable time.

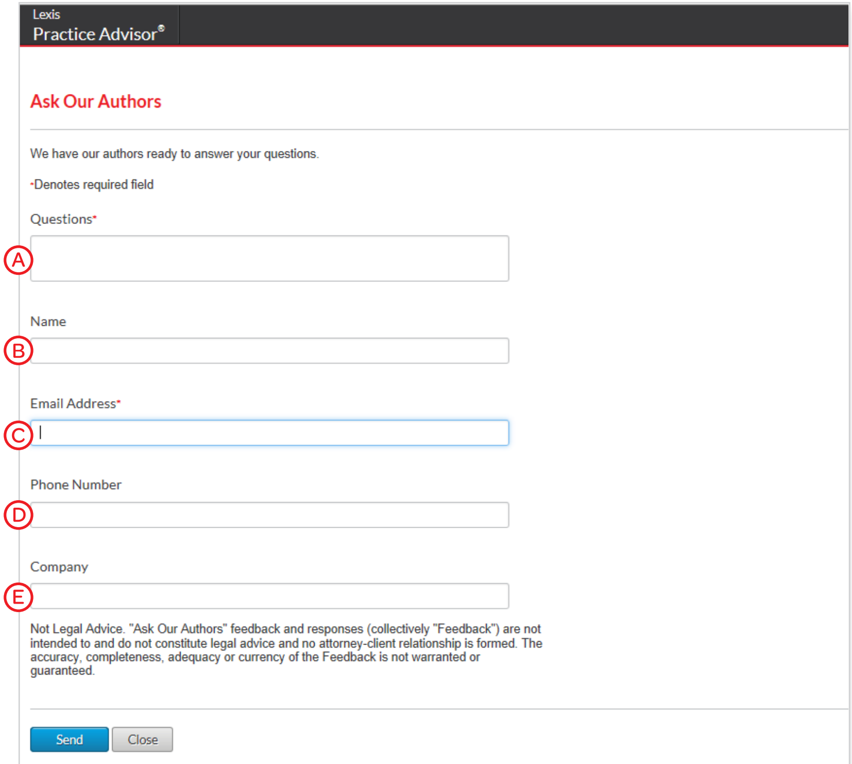
Ⓓ **International Filings**—Access both **UK Filings** from the National Storage Mechanism of the UK Listing Authority (which includes markets like the London Stock Exchange) and **SEDAR® filings** covering Canadian publicly traded companies and mutual funds. Both collections go back to the 1990s and include prospectuses, financial statements and relevant disclosure documents.

Ⓔ **Agreements, Model Documents**—Find model precedent language for a variety of business documents, including agreements, contracts, covenants, bylaws, opinions and more. Choose from among millions of sample documents culled from public companies' SEC disclosures.

Ⓕ **Agency Documents, Laws and Rules**—Our Agency Documents, Laws and Rules page lets you cross-search the entire federal regulatory landscape. It features regulatory, guidance, enforcement, research and news publications including complete coverage of the SEC. We also provide access to the Federal Register, the complete and current CFR and the complete U.S. Code.

Ⓖ **News, Law Firm Memos**—Our powerful alert system delivers the relevant news, data and guidance materials you're looking for from our premium suite of news publications. In addition to news, Securities Mosaic also provides access to a growing collection of Law Firm Memos, which is an invaluable resource for keeping up with the latest legal developments and doing in-depth research on special topics. This database of expert commentary features nearly 100,000 memos from North America's top firms and is updated daily.

Ask Our Authors



The prominent Ask Our Authors page enables users to reach out directly to our team of experienced professionals.

Ⓐ **Question field**—Enter your question and our authors will respond back with an answer.

Ⓑ **Name field**—Enter your full name.

Ⓒ **Email Address**—Enter the email address where our authors can reach you.

Ⓓ **Phone Number**—Enter the phone number where our authors can contact you.

Ⓔ **Company**—Enter the name of your organization.

The Lexis Practice Advisor Journal™—
Practical Guidance Backed by
Lexis Practice Advisor® Experts

Lexis Practice Advisor subscribers stay on the cutting-edge of legal trends and newsworthy events with this quarterly publication. It provides forward-thinking articles and practice insights written by leading attorney practitioners to keep our subscribers informed and prepared to handle on-going developments in the practice of law.

You'll find:

- Coverage of the hottest topics and world events impacting your practice, along with analysis of important issues and trends
- Articles written by expert attorney authors who have real-world experience in legal matters
- Links in the PDF version that take you to relevant sections within Lexis Practice Advisor
- Practice pointers offering drafting advice and forms related to current matters

The Lexis Practice Advisor Journal™ is complimentary with an online Lexis Practice Advisor subscription.

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Please note: All screens shown may change slightly as new features and enhancements are added.

LexisNexis®