

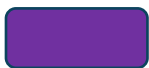
ANNUAL SALES CONFERENCE 2026

OPENING SESSION - Day Two

February 11, 2026 – 9:45 a.m. – 10:45 a.m. PST (local time)

Run of Show (60 min)
Warm welcome
Reflections and the market we operate in/current state of the business (Q&A with CEO)
Our people - Celebrate success and shoutout wins
Innovation / Opportunity / Priorities
Our mission <ul style="list-style-type: none">Why what we do matters
Close

WORKING SCRIPT



GENERAL MANAGER



PRESIDENT OF SEGMENT



VICE PRESIDENT OF SALES



GENERAL MANAGER 2



CEO



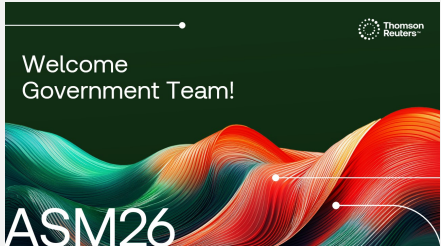

VICE PRESIDENT OF SALES




VICE PRESIDENT OF SALES

SLIDE DECK: [ASM Opening session slides .pptx](#)

WELCOME / OPENING


Time	Speaker	Music: fun, upbeat (we will have speaker bumpers)	Visuals / Creative
9:45 AM 1 minute	GENERAL MANAGER, GENERAL MANAGER 2, PRESIDENT OF SEGMENT	<p><i>*Pat, Karen and Dana go on stage*</i></p> <p>VOICE INTRO: Please welcome to the stage your Government leaders – GENERAL MANAGER, of Government Legal, GENERAL MANAGER 2, Manager of Risk and Fraud and PRESIDENT OF SEGMENT</p>	
9:46 AM 1 minute	GENERAL MANAGER, GENERAL MANAGER 2, PRESIDENT OF SEGMENT	<p>GENERAL MANAGER: Good morning, everyone! Welcome to our 2026 Annual Sales Meeting!</p> <p>GENERAL MANAGER 2: It's so great to see many of you here today for our first ever integrated COMPANY NAME Annual Sales Meeting, here in Las Vegas!</p> <p>PRESIDENT OF SEGMENT : Talking about first....I'm super excited to be here today for MY first every ASM. Is there anyone else in the room who is attending ASM for the first time? Here's to the first timers!</p>	
INTERACTIVITY – ICE T CAMEO VIDEO			
9:47 AM 1 minute	GENERAL MANAGER	<p>GENERAL MANAGER: Now, for some of you Vegas first timers (how many 1st timers in the room?), you may already feel the energy that makes this city famous.</p> <p>Let's take a moment to feel the energy in this room</p> <ul style="list-style-type: none"> • Fun to see people embrace / highest tenure at TR. Better Together. 	

		<ul style="list-style-type: none"> Combined with the energy of this city – set up for a great week together. <i>* start clapping and wait round of applause*</i> <p>And for some history - Now I’m not sure what you know about Vegas but this city is all about reinventing itself, it’s been transformed many times– often in the face of uncertainty.</p> <p>We’re standing in a place the was once a desert and is now what some would say is the “Entertainment Capital of the World” because founders made a series of bold, uncertain moves.</p>	
<p>9:48 AM</p> <p>1 minute</p>	<p>GENERAL MANAGER 2</p>	<p>GENERAL MANAGER 2:</p> <p>But while Vegas thrives on chance, at COMPANY NAME Government, we also offer something different:</p> <p>We’re known for delivering certainty.</p> <p>Our customers count on us for clarity, security, and trusted insights, so they can make decisions with confidence, not just hope for the best.</p> <p>In our team, we combine the best of both worlds:</p> <p>The confidence and trust our customers depend on.</p> <p>And the courage to innovate, to embrace new ideas, and to lead our industry forward</p> <p>This is what sets us apart from our competition.</p>	
<p>9:49 AM</p> <p>1 minute</p>	<p>PRESIDENT OF SEGMENT :</p>	<p>PRESIDENT OF SEGMENT :</p> <p>ASM is an important time for us all to come together and prepare for the year ahead. 2026. The year of Customer Obsession.</p>	

		<p>It's the year we double down on understanding their missions, focus on the most meaningful opportunities, and convert insight and conversation into clear direct impact.</p> <p>I'm excited to join you all and continue the critical work the team is doing.</p> <p>So, in 2026, lets ask ourselves:</p> <ul style="list-style-type: none"> o Where can I create more customer certainty? o Which opportunities demand my focus right now? o How will I share learnings across teams? <ul style="list-style-type: none"> • Close out – with energy – this is the year! 	
09: 50 AM 1 minute	GENERAL MANAGER	<p>GENERAL MANAGER: With that in mind, we have a very packed agenda and a special guest here today to share some insights and strategies on how we can make 2026, our best year yet. Let's welcome our President and CEO, CEO to the stage!</p> <p><i>PRESIDENT OF SEGMENT and GENERAL MANAGER 2 will walk off stage</i></p> <p><i>CEO will walk up on stage</i></p> <p>Voice: Introducing President and CEO!</p>	
Transition #1 (FIRESIDE CHAT)			
9:50 – 10:10 AM 20 minutes	CEO on stage with GENERAL MANAGER	<p>GENERAL MANAGER: Thanks so much for being here with us today! This is your 6th ASM as CEO, a few Virtual ASMs in there, but this is the first live one with everyone together.</p> <p><i>What are your goals for the week? Early Reflections?</i></p> <p>Appreciate – you chose to be with Gov. I have a handful of Gov topics we'd like to ask you...first a few questions to get to know you better. Bit of Fun.</p> <p><i>Rapid Fire -- Ice breaker question:</i></p> <ul style="list-style-type: none"> o Books or Podcasts? o Early Bird or Night Owl? Night club tomorrow. 	<i>No slides for the fireside chat, Speakers sit on stools.</i>

		<ul style="list-style-type: none"> o Cook in or Eat out? o Steak or Seafood? o Olympics: Winter or Summer? o Favorite sport? <p>Work related?</p> <ul style="list-style-type: none"> o Email or Teams Chat? o Best career advice – 10 seconds of less. o Favorite TR office to visit? o Precision or Speed? o Day with customers or day with investors? o Year of Customer Obsession – Favorite Customer Type? Profit Driven or Mission Driven Customers <p>GENERAL MANAGER: Ok, let’s talk shop. Please be candid.</p> <p>GENERAL MANAGER: Thank you Steve for joining us and for sharing your thoughts! Now let’s welcome YOUR Government leaders –VICE PRESIDENT OF SALES 1 , and VICE PRESIDENT OF SALES 2 ! But before then a quick message for you all....</p>	<p>Transition --- take away stools from stage and play Ice T video then switch to the slide welcoming Speakers</p>
Transition #2 OUR PEOPLE			
INTERACTIVITY – ICE T VIDEO “Do what it do”			
<p>10:11 AM</p> <p>1 minute</p>	<p>VICE PRESIDENT OF SALES</p>	<p>VICE PRESIDENT OF SALES : Wow, what an inspiring conversation with Steve! It truly underscores the importance of every single person in this room.</p> <p>Now I want to take a moment to shift gears and celebrate 2025. Let’s take a look back at what we achieved together and why it matters to our customers, partners and to our broader COMPANY NAME organization</p>	

		<p>Just like Pat shared... 2025 was a complex and successful year. This slide is my take on 2025, we had wonderful moments with customers and colleagues talking AI and efficiency around the country at Courts, AGs agencies, we boldly visited federal accounts during the height of DOGE and then around every turn, a challenge.</p> <p>What didn't we face in 2025? A wave of new competitors, new regulations, learning new products, new ways of selling and for those of us working with our federal clients, DOGE cuts, government shutdowns, and uncertainty.</p> <p>These challenges tested us, we learned from them and we grew stronger and more capable.</p> <p>And, something even more critical: when we work together, we're stronger.</p>	
<p>10:12 AM 1 minute</p>	<p>VICE PRESIDENT OF SALES</p>	<p>VICE PRESIDENT OF SALES :</p> <p>We adapted, we supported our customers through disruption, and we still delivered growth in Government Legal and our state and local markets while maintaining momentum federally.</p> <p>We delivered certainty to our customers by having the courage to take smart risks—by adapting, innovating, and finding new ways to support those who rely on us.</p> <p>Our story in 2025 is proof that certainty and progress go hand in hand with the willingness to embrace change and take bold steps. And that's how we'll continue to lead, together in 2026.</p>	

<p>10:13 am</p> <p>1 minute</p>	<p>VICE PRESIDENT OF SALES</p>	<p>VICE PRESIDENT OF SALES : Now we'd like to highlight a few wins across our team.</p> <p>In 2025 we rolled out our new values – obsess over our customers, challenge y(our) thinking, compete to win, act fast learn fast, and stronger together.</p> <p>Today we'll share how our Government team lived out those values every day – bringing us customer wins and successes.</p>	
<p>10:14 AM</p> <p>2 minutes</p>	<p>VICE PRESIDENT OF SALES</p>	<p>Within the team, there was a standout win that clearly demonstrated our commitment to Obsessing Over Our Customers. Congratulations SPEAKER NAME</p>	
<p>10:16 AM</p> <p>2 minutes</p>	<p>VICE PRESIDENT OF SALES</p>	<p>In 2025, the team truly showed up, delivering double-digit growth, overachieving on customer retention, and demonstrating each of our core values everyday.</p> <p>But nobody CHALLENGES OUR THINKING like WINNER NAME.</p> <p>Congratulations.</p>	
<p>10:18 AM</p> <p>2 minutes</p>	<p>VICE PRESIDENT OF SALES</p>	<p>We'd also like to give a shoutout to a sales manager who was promoted in 2025. WINNER NAME was promoted and immediately demonstrated his ability to ACT FAST & LEARN FAST.</p> <p>Congratulations, WINNER NAME.</p>	
<p>10:20 AM</p> <p>2 minutes</p>	<p>VICE PRESIDENT OF SALES</p>	<p>The Gov Legal federal team, led by WINNER NAME competes to win every day. They overcame challenges and found new ways to provide even more value to their customers. Our federal team demonstrated Compete to Win.</p> <p>-</p>	
<p>10: 22 AM</p> <p>2 minutes</p>	<p>VICE PRESIDENT OF SALES</p>	<p>Together our Solutions Consultants, led by WINNER NAME and Customer Success led by TEAM LEADER NAME drive outstanding results through their</p>	

		<p>incredible partnership with every part of the sales team. Driving advanced pre and post-sale outcomes, these teams exemplify stronger together.</p>	
<p>10: 24 AM</p> <p>2 minutes</p>	<p>VICE PRESIDENT OF SALES</p>	<p>Across our products, achieving and maintaining FedRAMP authorization is critical to maintaining our book of business in both Federal as well as State business, to driving new growth and to winning the AI Race</p> <p>In 2025 – we became FedRAMP “In Process”.</p> <p>Please give a huge round of applause for everyone. This was a remarkable accomplishment across so many teams at and everyone who supported – truly lived out all of our values.</p> <p>I want to specifically shoutout our FedRAMP guru, Head of Customer Trust.</p> <p>Thanks to his leadership, with FedRAMP, our customers can be confident that when they choose COMPANY NAME, they’re choosing a partner who is fully aligned with the highest standards of government compliance.</p> <p>This is equally important for our State and Local customers.</p> <p>We’re accelerating our progress toward FedRAMP authorization in 2026 across our portfolio, so that every product we deliver is backed by the certainty of world-class security.</p>	
<p>10:26 AM</p> <p>2 minute</p>	<p>VICE PRESIDENT OF SALES</p>	<p>Big round of applause for everyone!</p> <p>We’ve seen how far we’ve come and how much stronger we are when we lean on and work together.</p> <p>Those successes position us perfectly to talk about what's next and the opportunities that lie ahead so that when we meet again in 2027 we have many more wins to celebrate.</p> <p>Next up, is it really ASM if we don’t talk about innovation! Let’s welcome our leaders back to the stage!</p>	

Transition #3 (INNOVATION SHOWCASE)

INTERACTIVITY – CUSTOMER INTERVIEW WITH MIAMI PD, CLEAR INVESTIGATE SIZZLE REEL

10:28 AM

GENERAL
MANAGER

5 minutes

GENERAL MANAGER:

GENERAL MANAGER:

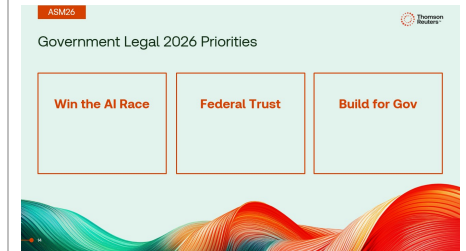
Gov Legal – How We WIN. 3 themes you’ll see throughout our time this week and year. No surprises.


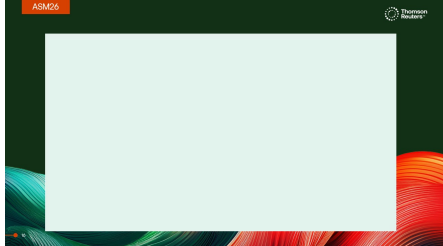
#1 - Simply put – **We need to win the AI Race.**

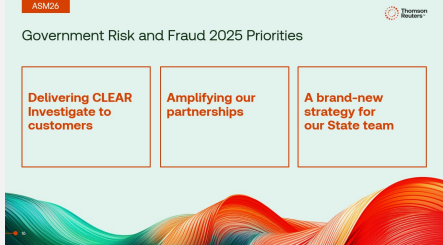
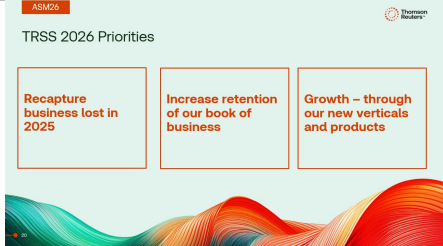
- Confidence -- If you built a Legal AI assistant from scratch – CoCounsel Legal would be it.
- It brings together the best **Legal Research, Analysis, and Know how** all in one from us – a TRUSTED Partner.
- **This means** reduced backlogs, access to Justice, and relief for over-worked public servants.



Our AI is **grounded in assets** that competitors simply don’t have. 100+ years of Authoritative content, legal expertise, and embedded workflows -- built by our 2000+ attorney editors. AI can’t replicate.;

- Although there is intense **new competition** in the Legal market – don’t play in Gov, yet.
 - Why? Gov is HARD!
 - Security, compliance, contracting, long sales cycles.
- We have an unbelievable opportunity to extend our #1 position and **MAKE a TON of Money** this year!
 - 87% of our customers don’t have any form of AI.
 - Our customers retain at 95% - they TRUST US. They’re Depending on us.



		<ul style="list-style-type: none"> ○ This week – we’ll double down persona based value props to enhance our Pitch. <p>Let’s hear from one of our customers, Cindy Guerra, from the Miami Public Defender’s Office, about how CoCounsel is transforming the way they work. Clip from Synergy this fall.</p> <p>(Visuals: Play a 1–2 minute customer testimonial video about CoCounsel Legal.)</p> <p>Themes from Cindy – “Do more with Less” “Better Results” Find your Cindy – tell our Story.</p> <p>#2 Our second priority is leveraging the TRUST we’ve built within our Federal Market.</p> <p>#3 Build for Gov. Finally, we’re not trying to shoehorn Law Firm products into the Gov.</p> <ol style="list-style-type: none"> a. Functionality b. We’re building for the Courts – New UI, Skills, and Bench memo. c. Launching the best tools for Law Schools! d. This extends our leading position. <p>These are the priorities – but the key ingredients are our PEOPLE. We have the BEST team. I couldn’t be more excited about this year! Together, hit the jackpot and win big!</p> <p>Now let’s hear from Karen / Risk Business</p>	 
<p>10:33 AM</p> <p>5 minutes</p>	<p>GENERAL MANAGER 2</p>	<p>GENERAL MANAGER 2: In Government Risk and Fraud – this week we fully launched CLEAR Investigate, a purpose-built AI assistant that transforms questions into comprehensive searches to simplify routine tasks and find unknown connections.</p>	

		<p>Now, let's hear what our customers are saying on how CLEAR Investigate is changing the way they work.</p> <p>Visuals: Customer testimonial</p> <p>Together, CoCounsel Legal and CLEAR Investigate empower government professionals to work smarter, act faster, and deliver on their mission with confidence.</p> <p>In addition to accelerating Clear Investigate, we will also focus on amplifying our partnerships. These partnerships also fulfill our desire to "be where our customers are" by integrating with world-class platforms making it easier for our customers to get the answers they need.</p> <p>We also have a brand-new strategy for our State team so that we can bring CLEAR to critical state agencies and inform the way forward to reduce fraud, waste and abuse.</p> <p>Now let's hear from PRESIDENT OF SEGMENT .</p>	 <p>Government Risk and Fraud 2025 Priorities</p> <ul style="list-style-type: none"> Delivering CLEAR Investigate to customers Amplifying our partnerships A brand-new strategy for our State team
<p>10:38 AM</p> <p>2 minutes</p>	<p>PRESIDENT OF SEGMENT</p>	<p>PRESIDENT OF SEGMENT : For COMPANY NAME, our ambition is to be the trusted leader in scalable tech solutions for governments and global institutions.</p> <p>In 2026, we will focus on 3 things: (1) Recapture business, (2) Increase retention of our book of business, and (3) Growth – through our new verticals and products.</p> <p>To do that, we'll continue to deepen our partnerships and identify new opportunities that address both the Government's top priorities, as well as those in the Commercial sector.</p>	 <p>TRSS 2026 Priorities</p> <ul style="list-style-type: none"> Recapture business lost in 2025 Increase retention of our book of business Growth – through our new verticals and products
<p>Transition #4 (Our Mission)</p>			
<p>10:40 AM</p>		<p>But we cannot leave today without talking about what really matters.</p>	

<p>3 minutes</p>	<p>PRESIDENT OF SEGMENT</p>	<p>Our mission. Why we do the work we do.</p> <p>Our work enables government agencies to fulfill their mission—keeping communities safe, ensuring equal access to justice, and improving lives.</p> <p>Through our solutions, we help officials act decisively, uncover facts securely, and uphold the rule of law.</p> <p>Whether it’s helping law enforcement reunite families, supporting prosecutors with vital insights, or equipping agencies to detect and prevent crimes like money laundering, human trafficking, or drug smuggling—our mission is clear: to help our customers protect and serve their communities.</p> <p>Every product we deliver strengthens public trust and empowers agencies to serve citizens better.</p> <p>I want to remind you all why the work we do matters.</p> <p>Today we’ll learn about a partnership that is making a difference.</p> <p>One of our Everyday heroes.</p> <ul style="list-style-type: none"> o *Play video* <p>Now I'd like to hand the mic to a few of our colleagues to get their perspective on what they are excited about in 2026.</p>	
<p>Transition #5 (Closing)</p>			
<p>10:43 AM</p> <p>2 minutes</p>	<p>SALES LEADER 1</p> <p>SALES LEADER 2</p> <p>SALES LEADER 3</p>	<p>Sales Reps from sub segments – share one minute about what they’re excited about for this year..BRING THE ENERGY</p>	

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