

edgar agents

EDGAR Next Filing Delegation Guide

Version 2.0





Filing Delegation

What is Filing Delegation?

Filing delegation allows a Filer to grant an EDGAR account the authority to make filings on their behalf. This can include delegating authority to a filing agent, law firm, broker-dealer, or related entity. The delegated entity can then perform tasks such as submitting filings to the SEC.

Who Can Delegate Authority?

Only the account administrators of a Filer's account can delegate filing authority. This ensures that the delegation process is controlled and secure.

Key Points to Remember

- Only account administrators can delegate filing authority.
- Delegation must be confirmed in the EDGAR Next dashboard by the Compliance date - September 15th, 2025.
- Filing submissions will be blocked after the compliance date if the delegation process to a delegated entity such as EdgarAgents is incomplete.

Follow this guide to learn how to delegate filing authority to EdgarAgents after enrolling the existing EDGAR account or upon the activation of EDGAR access in [the Filer Management website](#) after a Form ID application or restore of access.

[Note: Throughout this guide and in the context of EDGAR Next, the term "filer" refers to any entity or individual that submits filings through the EDGAR system. This includes companies, individuals, and other entities that are required to file documents with the SEC.]

Filing Delegation



After successful enrollment or the acceptance of a Form ID application, the Filers' Account Administrators can delegate filing authority via the dashboard to any EDGAR account, allowing multiple filing agents.

- From your dashboard, select the filer name under "My Accounts." You will now be able to access the EDGAR account for the selected filer.

The screenshot shows the 'Filer Management' dashboard. At the top, there is a 'SIGN OUT' button and a 'SHOW NOTIFICATIONS' button with a '99+' notification badge. Below this, the user's login information is displayed: 'Login.gov email: @edgaragents.com' and 'Contact information: no contact information available'. There is also a link to 'Edit my information'. The main section is titled 'MY ACCOUNTS' and contains a 'Filter by' input field. Below the filter is a table with the following columns: Filer name, Filer CIK, Role(s), Invite date, Accept date, Confirmation due date, Allow delegation request, Auto accept delegation, and Actions. The first row in the table has 'Enrollment 128' circled in red. A tooltip is visible over the first row, stating 'Click to manage Enrollment 128 (CIK *****702) account'.

| | Filer name | Filer CIK | Role(s) | Invite date | Accept date | Confirmation due date | Allow delegation request | Auto accept delegation | Actions |
|--------------------------|----------------|-----------|-------------------------|-------------|-------------|-----------------------|--------------------------|------------------------|---------|
| <input type="checkbox"/> | Enrollment 128 | *****702 | Account Administrator | 03/06/2025 | 03/06/2025 | 06/30/2025 | Yes | - | ... |
| <input type="checkbox"/> | Edg LLC | | technical Administrator | 10/30/2023 | 10/31/2023 | 12/31/2025 | - | - | ... |

Filing Delegation



The screenshot shows the 'Filer Management' dashboard. At the top, there is a dark blue header with the text 'Filer Management'. Below the header, there are two buttons: 'BACK TO MY ACCOUNTS' on the left and 'SIGN OUT' on the right. The main content area is divided into several sections. On the left, there is a section for 'Account, CIK:' with a dropdown menu showing 'Enrollment 128 - CIK *****702' and 'My role(s): Account Administrator'. On the right, there is a section for 'ACCOUNT DETAILS' with a green checkmark and the text 'ANNUAL CONFIRMATION (due date 05/30/2023)'. Below these sections, there is a list of tabs: '+ MANAGE INDIVIDUALS', '+ MANAGE CCC & PASSWORD', '+ MANAGE DELEGATIONS AND USER GROUPS' (highlighted with a red circle), '+ MANAGE ABS ISSUER ACTIVITY', and '+ MANAGE FILER API TOKEN'. A small tooltip is visible over the highlighted tab, containing the text 'MANAGE DELEGATIONS AND USER GROUPS - Expand section'.

- Click on the “Manage Delegations and User Groups” tab.

Filing Delegation

- Click “Add Delegation” to delegate filing authority to another entity.



MANAGE DELEGATIONS AND USER GROUPS

[Delegations to](#) | [Delegations received](#) | [User groups](#) | [Delegation preferences](#) Show all grids

Delegations to
(none - you have not authorized any entities to file on behalf of you)

ADD DELEGATION

| Delegated entity name | CIK | Status | Last updated | Actions |
|-----------------------|-----|--------|--------------|---------|
|-----------------------|-----|--------|--------------|---------|

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Filing Delegation



- Enter CIK number or Name of the delegated entity.
- To delegate to **EdgarAgents LLC**, add these 2 CIKs:
 1. **CIK: 0001213900**
Name: EdgarAgents LLC
 2. **CIK: 0001013762**
Name: EdgarAgents LLC 2
- Review delegated Filer information and click “Delegate”

Disclaimer: EdgarAgents LLC uses multiple filing CIKs to ensure continuity and reliability during unforeseen disruptions. The use of multiple CIKs helps safeguard our clients' filing processes and uphold the integrity and reliability of our services. Clients are instructed to delegate to both CIKs to maintain secure and uninterrupted service.

Delegate authority to file

To delegate authority to file on your behalf to another filer, enter the CIK number or name of that filer below.

- Only delegate to a filer with which you have an existing agreement to file on EDGAR on your behalf.
- If the filer's account administrator accepts the invitation, the filer will become your delegated entity and will be able to make filings on your EDGAR account.
- You may cancel the delegation at any time by selecting "Cancel delegation." The delegated entity need not accept the cancellation for it to be effective.
- For more information on delegation, see [EDGAR Next](#) on SEC.gov.

Delegated filer(s) ABCDE Limited - CIK 000*****

Enter your delegated entity's CIK or Name
0001213900

There may be multiple filers with similar names, so please confirm the CIK is correct.

| | |
|------------------------|-----------------|
| Name | EdgarAgents LLC |
| CIK | 0001213900 |
| City | OLD BRIDGE |
| State | NJ |
| Zip code | 08857 |
| State of Incorporation | |

Delegated filer(s): ABCDE Limited - CIK 000*****

Enter your delegated entity's CIK or Name
0001013762

| | |
|------------------------|-------------------|
| Name | EdgarAgents LLC 2 |
| CIK | 0001013762 |
| City | NEW YORK |
| State | NY |
| Zip code | 10001 |
| State of Incorporation | NY |

CANCEL

DELEGATE



THANK YOU

For additional assistance with EDGAR Next contact your representative or email
edgarnext@edgaragents.com

For general queries contact info@edgaragents.com