

Service Team Directory

Last Revised Date: **Nov 1, 2023**

BizFilings Team

Region: Transactional Services

Team Type: Alternative Brands (BFI/Del Reg/ID)

Manager(s): Molly Miller/Jessica Marschke (Associate Director Chris Das)

Phone Number: 800-981-7183

Email Address:

Internal:

CSR Team: CSRBFI@wolterskluwer.com (Any general inquiries, order placement, RA-Only account set-up)

Registered Agent Team: CLS-BFI-RAD@wolterskluwer.com (Any RA Signatures, CT ProComply Invoice/Arrow questions, or anything SOP related)

Processing Team: CLS-BFI-Processing@wolterskluwer.com (Any filing rejections or technical questions for filings already in progress where a revision is needed)

External (for client inquiries):

General contact email: info@bizfilings.com

Registered Agent signature or audit request: agent@bizfilings.com

Chatter: N/A

Hours: 9:00 AM-8:00 PM ET

BL (Business License) Team

Phone Number: 800-292-0909

Email Address: BLPartners@wolterskluwer.com

Notes: This email address is **internal only** and should **never** be provided to customers. This email address should be used for general questions about BL scope & services and follow-ups to CLiC orders not yet assigned. If a customer needs to communicate with the BL team and does not have their contact person's information, look up the BL Account Manager in CLiC and provide that person's email to the customer for direct communication.

Email Address: BLResearch@wolterskluwer.com

Notes: This email address should be used for large project workflow discussions and escalations for research and assessment services.

Email Address: BLaccounting@wolterskluwer.com

Notes: This email address should be used for all Inquiries and escalations for BL invoicing

Email Address: BLFilings@wolterskluwer.com

Notes: This email address should be used for large project workflow discussions and escalations for transactional and renewal filing services

Email Address: BLOnboarding@wolterskluwer.com

Notes: This email address should be used for large project workflow discussions and escalations during the onboarding process

BLMS (License Managed Services Team)

Manager(s): Andrea Cairns/Krystina Ehrlich/Tricia Pierson/Dana Young

Phone Number: 866-441-8538

Email Address: CLS-BLMS@wolterskluwer.com

Chatter: @CT BLMS Team

Hours: 8:30 AM-6:30 PM ET

Cash Applications Team

Region: Operations & Support

Team Type: Billing & Support

Manager(s): Nichol McCroy
Phone Number: 312-288-3551
Email Address: UnappliedCashTeam@wolterskluwer.com
Chatter: @Centralized Team
Hours: 9:00 AM-6:00 PM ET
E1 ID#: 7728670

Central Team 1

Region: Transactional Services
Team Type: Corporations
Manager(s): Stephanie Hencz
Phone Number: 866-401-8252 / Local: 214-979-9480
Email Address: CentralTeam1@wolterskluwer.com
Chatter: @Central Team 1
Hours: 8:00 AM-8:30 PM ET
E1 ID#: 1403331

Central Team 2

Region: Transactional Services
Team Type: Law Firm West
Manager(s): Lauren Johnson
Phone Number: 866-705-2500 / Law Firm Group: 866-977-9739
Email Address: CentralTeam2@wolterskluwer.com
Chatter: @Central Team 2
Hours: 8:00 AM-7:00 PM ET
E1 ID#: 1403320

Central Team 4

Region: Transactional Services
Team Type: Law Firm West
Manager(s): Stefani Bergquist
Phone Number: 866-469-1620 / Law Firm Group: 866-977-9739
Email Address: CentralTeam4@wolterskluwer.com
Chatter: @Central Team 4
Hours: 8:30 AM-7:00 PM ET
E1 ID#: 1403333

Centralized — Billing Resolution Team (fka Billing Resolution Team 2/Dispute Resolutions)

Region: Operations & Support
Team Type: Billing & Support
Manager(s): Stephanie Tempongko/Paul Triukas
Phone Number: 844-447-4099 / Local: 312-288-3567
Email Address: BillingResolutionTeam2@wolterskluwer.com
Chatter: N/A
Hours: 8:00 AM-6:00 PM ET
E1 ID#: 11685188

Centralized — CT Owned Collections Team (FKA Billing Resolution Team 1)

Region: Operations & Support
Team Type: Billing & Support
Manager(s): Lisa Wurth
Phone Number: 866-293-6099 / Local: 312-288-3553
Email Address: BillingResolutionTeam1@wolterskluwer.com
Chatter: N/A
Hours: 8:00 AM-6:00 PM ET
E1 ID#: 11685187

Centralized — Electronic Billing Team (FKA Centralized Team)

Region: Operations & Support

Team Type: Billing & Support

Manager(s): Nichol McCroy

Phone Number: 866-833-4592 / Local: 312-288-3551

Email Address: CLS-CentralizedTeam@wolterskluwer.com

Chatter: @Centralized Team

Hours: 9:00 AM-7:00 PM ET

E1 ID#: 7728670

Centralized — Rep Services Team (FKA Rep Services Team)

Region: Operations & Support

Team Type: Billing & Support

Manager(s): Jennifer Kurz

Phone Number: 855-284-8307 / Local: 312-288-3559

Email Address: RepServicesTeam@wolterskluwer.com

Chatter: @Rep Services Team

Hours: 8:30 AM-6:00 PM ET

E1 ID#: 9800555

Corporate Staffing Team

Region: Transactional Services

Team Type: Alternative Brands (BFI/Del Reg/ID)

Manager(s): Steve Zimmer/Jennifer Schwartz

Phone Number: 877-428-3477 / Local: 302-777-0240

Email Address: CLS-WMCorpStaffing@wolterskluwer.com

Chatter: @CT Corporate Staffing Team

Hours: 8:30 AM-5:30 PM ET

E1 ID#: 1403317

Corporation Team 1

Region: Transactional Services

Team Type: Corporations

Manager(s): Kim Baggett

Phone Number: 866-539-8692 / Local: 213-627-8252

Email Address: CorporationTeam@wolterskluwer.com

Chatter: @Corporation Team 1

Hours: 8:00 AM-9:00 PM ET

E1 ID#: 8818763

Corporation Team 2

Region: Transactional Services

Team Type: Corporations

Manager(s): Audrea Nabor/Taylor Sobol

Phone Number: 866-539-8692 / Local: 213-627-8252

Email Address: CorporationTeam@wolterskluwer.com

Chatter: @Corporation Team 2

Hours: 8:00 AM-9:00 PM ET

E1 ID#: 8934332

Corporation Team 3

Region: Transactional Services

Team Type: Corporations

Manager(s): Eric Carlson

Phone Number: 866-539-8692 / Local: 213-627-8252

Email Address: CorporationTeam@wolterskluwer.com

Chatter: @Corporation Team 3

Hours: 8:00 AM-9:00 PM ET

E1 ID#: 8976543

Deal Team 1

Region: Transactional Services

Team Type: RM & Deal

Manager(s): David Westcott

Phone Number: 866-203-1500 / Local: 212-271-7740

Email Address: DealTeam@wolterskluwer.com

Chatter: N/A

Hours: 8:30 AM-7:00 PM ET

E1 ID#: 8934355

Deal Team 2

Region: Transactional Services

Team Type: RM & Deal

Manager(s): Sandy Zwijack/Ryan McLaughlin

Phone Number: 866-203-1500 / Local: 212-271-7740

Email Address: DealTeam@wolterskluwer.com

Chatter: @Deal Team 2

Hours: 8:30 AM-7:00 PM ET

E1 ID#: 9908704

East Team 1

Region: Transactional Services

Team Type: Law Firm East

Manager(s): Kathy Widdoes

Phone Number: 302-777-0200 / Law Firm Group: 866-977-9739

Email Address: EastTeam1@wolterskluwer.com

Chatter: @East Team 1

Hours: 8:00 AM-6:00 PM ET

E1 ID#: 1403295

East Team 2

Region: Transactional Services

Team Type: Corporations

Manager(s): Chris Iredell

Phone Number: 866-401-8252 / Local: 214-979-9480

Email Address: EastTeam2@wolterskluwer.com

Chatter: @East Team 2

Hours: 8:00 AM-8:30 PM ET

E1 ID#: 3789544

ECMS Operations Team

Region: Managed Services

Team Type: ECMS & EMS

Manager(s): Jason Proffitt

Phone Numbers: N/A

Email Address: ECMSOperationsTeam@wolterskluwer.com

Chatter: n/a

Hours: 8:30 AM-6:30 PM ET

E1 ID#: 12834655

Entity Compliance Managed Services Team 1 (FAI over 1000/MAM over 25)

Region: Managed Services

Team Type: ECMS & EMS

Manager(s): TBD

Phone Numbers: 877-888-1245 / Local: 314-955-8245
Email Address: ECMSTeam1@wolterskluwer.com
Chatter: @CT ECMS Team 1
Hours: 8:30 AM-6:30 PM ET
E1 ID#: 4131792

Entity Compliance Managed Services Team 2 (Large Corps over 25)

Region: Managed Services
Team Type: ECMS & EMS
Manager(s): Collin Menkhus
Phone Number: 877-888-1245 / Local: 314-955-8245
Email Address: ECMSTeam2@wolterskluwer.com
Chatter: @CT ECMS Team 2
Hours: 8:30 AM-6:30 PM ET
E1 ID#: 9144143

Entity Compliance Managed Services Team 3 (Mid-Market, Law Firm, Small Business over 25)

Region: Managed Services
Team Type: ECMS & EMS
Manager(s): Adam Steimel
Phone Number: 877-888-1245 / Local: 314-955-8245
Email Address: ECMSTeam3@wolterskluwer.com
Chatter: @CT ECMS Team 3
Hours: 8:30 AM-6:30 PM ET
E1 ID#: 9665448

Entity Compliance Managed Services Team 4 (1-25 Units)

Region: Managed Services
Team Type: ECMS & EMS
Manager(s): Lauren Miller
Phone Number: 877-888-1245 / Local: 314-955-8245
Email Address: ECMSTeam4@wolterskluwer.com
Chatter: @CT ECMS Team 4
Hours: 8:30 AM-6:30 PM ET
E1 ID#: 10053303

Entity Compliance Managed Services Team 5 (FAI 25-999)

Region: Managed Services
Team Type: ECMS & EMS
Manager(s): Shannon Diamond
Phone Number: 877-888-1245 / Local: 314-955-8245
Email Address: ECMSTeam5@wolterskluwer.com
Chatter: @CT ECMS Team 5
Hours: 8:30 AM-6:30 PM ET
E1 ID#: 12070675

EMS Team (EMS only, no ARMS; formerly EMS Operations)

Region: Managed Services
Team Type: ECMS & EMS
Manager(s): Caroline McKeon
Phone Number: 877-888-1245 / Local: 314-955-8245
Email Address: EMSTeam@wolterskluwer.com
Chatter: @CT EMS Team
Hours: 8:30 AM-5 PM ET
E1 ID#: 11994340

Extended Hours Team

Region: Transactional Services
Team Type: Law Firm East
Manager(s): Candice Pignataro/Michelle Johnson
Phone Number: 800-554-2092
Email Address: AfterHoursTeam@wolterskluwer.com
Chatter: @After Hours Team
Hours: 5:00 AM-12:00 AM ET
E1 ID#: 9508961

Global Services Team

Region: Managed Services
Team Type: Onboarding & Global
Manager(s): Leslie Martin
Phone Number: 800-428-4685 / Local: 212-590-9009
Email Address: CT-GlobalServices@wolterskluwer.com
Chatter: @Global Services Team
Hours: 8:00 AM-9:00 PM ET
E1 ID #: 1403314

Law Firm Team 1

Region: Transactional Services
Team Type: Law Firm West
Manager(s): Rose Song/Theresa Buck
Phone Number: 888-263-1128 / Local: 617-531-5861 (Small Law Firm Group)
Email Address: LawFirmTeam1@wolterskluwer.com
Chatter: @Law Firm Team 1
Hours: 8:00 AM-6:00 PM ET
E1 ID#: 8934367

Major Account Team 1

Region: Transactional Services
Team Type: Corporations
Manager(s): Stephen Rullis
Phone Number: 877-564-7529 / Local: 302-777-6312
Email Address: MajorAccountTeam1@wolterskluwer.com
Chatter: @MAMTeam1
Hours: 8:00 AM-6:00 PM ET
E1 ID#: 9405652

Major Account Team 2

Region: Transactional Services
Team Type: Corporations
Manager(s): Jori Sawan/Amanda Szabo
Phone Number: 877-564-7529 / Local: 302-777-6312
Email Address: MajorAccountTeam2@wolterskluwer.com
Chatter: @MAMTeam2
Hours: 9:00 AM-8:00 PM ET
E1 ID#: 9405697

Northeast Team 1

Region: Transactional Services
Team Type: Law Firm East
Manager(s): Kevin Doherty
Phone Number: 866-352-0128 / Law Firm Group: 866-977-9739
Email Address: NortheastTeam1@wolterskluwer.com
Chatter: @Northeast Team 1
Hours: 8:00 AM-6:00 PM ET

E1 ID#: 1403319

Onboarding Team 1 (Implementation)

Region: Managed Services

Team Type: Onboarding & Global

Manager(s): Natalie Pickens

Phone Number: N/A

Email Address: OnboardingTeam@wolterskluwer.com

Chatter: @Onboarding Implementation Team

Hours: 10:00 AM-6:00 PM ET

E1 ID#: 9665447

Onboarding Team 2 (Implementation)

Region: Managed Services

Team Type: Onboarding & Global

Manager(s): Stacia Simon

Phone Number: N/A

Email Address: OnboardingTeam@wolterskluwer.com

Chatter: @Onboarding Implementation Team

Hours: 10:00 AM-6:00 PM ET

E1 ID#: 12020357

Onboarding Team (Operations)

Region: Managed Services

Team Type: Onboarding & Global

Manager(s): Matt Sawyer

Phone Number: N/A

Email Address: OnboardingTeam@wolterskluwer.com

Chatter: @Onboarding Operations Team

Hours: 10:00 AM-6:00 PM ET

E1 ID#: 4149405

Partner & Affiliate Team

Region: Transactional Services

Team Type: Alternative Brands (BFI/Del Reg/ID)

Manager(s): Tim Jensen

Phone Number: 888-579-0286 / Local: 516-515-2901

Email Address: AffiliateTeam@wolterskluwer.com

Chatter: @Partner and Affiliate Team

Hours: 7:00 AM-6:00 PM ET

E1 ID#: 9004744

Quality Service Team

Region: Service Development

Team Type: Training, Content, & QA

Manager(s): Cristie Myers

Phone Number: N/A

Email Address: QualityServiceTeam@wolterskluwer.com

Chatter: @Quality Service Team

Hours: 7:00 AM-5:00 PM ET

E1 ID#: 9887715

Service Solutions Team 1

Region: Transactional Services

Team Type: RM & Deal

Manager(s): Nick Bulleri

Phone Number: 800-666-5597 / Local: 212-817-3186

Email Address: CLS-ServiceSolutionsTeam@wolterskluwer.com

Chatter: @Service Solutions Team 1

Hours: 8:00 AM-7:00 PM ET

E1 ID#: 8271931

Service Solutions Team 2

Region: Transactional Services

Team Type: RM & Deal

Manager(s): Meredith Hellwig

Phone Number: 800-666-5597 / Local: 212-817-3186

Email Address: CLS-ServiceSolutionsTeam@wolterskluwer.com

Chatter: @Service Solutions Team 2

Hours: 9:00 AM-9:00 PM ET

E1 ID#: 10407892

Small Business Team 1

Region: Transactional Services

Team Type: Small Business

Manager(s): Mark Pruett/Rachel Lawson

Phone Number: 877-467-3525 / Local: 608-827-7382

Email Address: SmallBusinessTeam@wolterskluwer.com

Chatter: @Small Business Team 1

Hours: 8:00 AM-9:00 PM ET

E1 ID#: 9715542

Small Business Team 2

Region: Transactional Services

Team Type: Small Business

Manager(s): Christine Kelm

Phone Number: 877-467-3525 / Local: 608-827-7382

Email Address: SmallBusinessTeam@wolterskluwer.com

Chatter: @Small Business Team 2

Hours: 8:00 AM-9:00 PM ET

E1 ID#: 6303215

Small Business Team 3

Region: Transactional Services

Team Type: Small Business

Manager(s): Eric Jensen

Phone Number: 877-467-3525 / Local: 608-827-7382

Email Address: SmallBusinessTeam@wolterskluwer.com

Chatter: @Small Business Team 3

Hours: 8:00 AM-9:00 PM ET

E1 ID#: 9715973

Small Business Team 4

Region: Transactional Services

Team Type: Small Business

Manager(s): Nikki Nelson/Eric McConahay

Phone Number: 877-467-3525 / Local: 608-827-7382

Email Address: SmallBusinessTeam@wolterskluwer.com

Chatter: @Small Business Team 4

Hours: 8:00 AM-9:00 PM ET

E1 ID#: 9716419

South Team 1

Region: Transactional Services

Team Type: Law Firm West
Manager(s): Allie Robertson
Phone Number: 214-979-9450 / Law Firm Group: 866-977-9739
Email Address: SouthTeam1@wolterskluwer.com
Chatter: @South Team 1
Hours: 8:30 AM-7:00 PM ET
E1 ID#: 1403301

South Team 2

Region: Transactional Services
Team Type: Corporations
Manager(s): Christopher Roberts/Denise Bell
Phone Number: 866-401-8252 / Local: 214-979-9480
Email Address: SouthTeam2@wolterskluwer.com
Chatter: @South Team 2
Hours: 8:00 AM-8:30 PM ET
E1 ID#: 1403321

Special Projects Team (SWAT)

Region: Managed Services
Team Type: Onboarding & Global
Manager(s): Kara Korosec
Phone Number: 312-288-3510
Email Address: SpecialProjectsTeam@wolterskluwer.com
Chatter: @Special Projects Team
Hours: 8:30 AM-8:00 PM ET
E1 ID#: 3636585

UCC Team 1

Region: Transactional Services
Team Type: Law Firm East
Manager(s): Priscilla Reynolds/Frank Robbins
Phone Number: 800-713-0710 (UCC Group)
Email Address: UCCTeam1@wolterskluwer.com
Chatter: @UCC Team 1
Hours: 8:00 AM-6:00 PM ET
E1 ID#: 1403339

UCC Team 2

Region: Transactional Services
Team Type: Law Firm West
Manager(s): Diana Gierut
Phone Number: 312-288-3552 / UCC Group: 800-713-0710
Email Address: UCCTeam2@wolterskluwer.com
Chatter: @UCC Team 2
Hours: 9:00 AM-7:00 PM ET
E1 ID#: 1403341

UCC Team 5

Region: Transactional Services
Team Type: Law Firm East
Manager(s): Cleo Harrison
Phone Number: 800-713-0710 (UCC Group)
Email Address: UCCTeam5@wolterskluwer.com
Chatter: @UCC Team 5
Hours: 8:00 AM-6:00 PM ET
E1 ID#: 12090579

UCC Team 6

Region: Transactional Services

Team Type: Law Firm East

Manager(s): Stephen Grove

Phone Number: 800-713-0710 (UCC Group)

Email Address: UCCTeam6@wolterskluwer.com

Chatter: @UCC Team 6

Hours: 8:00 AM-6:00 PM ET

E1 ID#: 3772796

West Team 1

Region: Transactional Services

Team Type: Law Firm West

Manager(s): Devin Randolph

Phone Number: 800-874-5258 / Law Firm Group: 866-977-9739

Email Address: WestTeam1@wolterskluwer.com

Chatter: @West Team 1

Hours: 10:00 AM-9:00 PM ET

E1 ID#: 1403311