



The Power of Partnership

Broadleaf Financial
Group and CSC

TESTIMONIAL



What stands out is the partnership. We know we can ask questions, learn from their expertise, and get thoughtful answers. That's rare.

DAVE ANDERSON

Chief Operating Officer, Broadleaf Financial Group



When Broadleaf Financial Group launched in 2025, every operational decision carried weight. As a newly established strategic equipment leasing and financing company serving Fortune 1000 organizations, Broadleaf needed a strong foundation—especially when it came to protecting security interests and managing critical Uniform Commercial Code (UCC) filings and due diligence.

Broadleaf wanted to use the most advanced technology available for UCC searching, filing, and portfolio monitoring. They also wanted expert support they could rely on as their growth accelerated and new complexities emerged. That's why they selected CSC and its platform Lien PerfectSM for Lenders from the very beginning.

Building a strong foundation—from day one

Dave Anderson, Chief Operating Officer, and Kristen Caruso, Vice President of Contracts Administration, lead Broadleaf's UCC filing, documentation, due diligence, and compliance efforts.

"We started the company in July [2025], and partnering with CSC was one of the easiest decisions we made," says Dave. "We knew we needed a provider we could trust, and CSC was the clear choice."

For Broadleaf, ensuring its security interests are properly protected is fundamental to the business.

"When we provide financing, our expectation is to maintain a secure position in the equipment we finance," explains Dave. "That means understanding where we stand relative to other parties, conducting thorough due diligence, and making sure our filings are accurate. CSC is core to that process."

Improving efficiency, reducing risk

Today, CSC Lien Perfect helps Broadleaf streamline several critical processes, while providing confidence in its filings and searches. The company also now benefits from enhanced visibility into each customer's status—thanks to CSC's portfolio monitoring solutions.

"From the beginning, we implemented corporate tracking and monitoring capabilities that help us stay informed about changes that could impact risk, including corporate status changes and bankruptcy activity," says Kristen. "That allows us to be proactive instead of reactive."



The platform also helps support Broadleaf's filing process.

"One of my favorite features [of Lien Perfect] is the legal name verification functionality," Kristen explains. "It seems like a small thing, but it's incredibly important. If a debtor name is incorrect, it can create significant issues, require amendments, generate additional costs, and potentially affect filing perfection. Having that validation built into the workflow provides confidence our filings are accurate."

Another standout feature is Lien Perfect's real-time filing preview. "I'm a visual person," says Kristen. "Being able to see exactly how the filing will appear before submission gives us certainty and helps reduce the likelihood of mistakes."

"Designed by people who do this work"

The efficiency gains are especially significant when reviewing large UCC search results. At previous companies, Kristen manually created reports by extracting debtors, secured parties, collateral descriptions, and potential issues from search records that could span hundreds—or even thousands—of pages. The process often took days.

With CSC Lien Perfect, search results are organized with more clarity. The team has access to critical data, presented precisely how they need it.

"It helps bring you to the information you care about faster," said Dave. "The way filings, amendments, assignments, and continuations are grouped feels very intentional. It's like the platform was designed by people who do this work."

The people behind the Lien Perfect platform

From onboarding through day-to-day support, Broadleaf relies on CSC's dedicated account managers for guidance. They value CSC's ability to pair responsive service with deep subject matter expertise.

Whether working with their account representatives or CSC's broader support organization, Dave, Kristen, and their colleagues consistently receive knowledgeable guidance, timely responses, and a commitment to finding the right answer.

"You can feel the level of care," Dave adds. "Accuracy matters to them [CSC]. They take the time to understand our questions, provide detailed answers, and make sure we have the information we need to make good decisions."

That level of support and knowledge sharing is uncommon in the industry—and it empowers Broadleaf as they continue to expand.

A relationship built on confidence

Broadleaf was founded on a simple principle: to be a true partner, not just a provider. That philosophy is one reason the company's relationship with CSC has been so successful. Both organizations are committed to building lasting relationships, navigating complexity with expertise, and delivering solutions that put clients first.

"It's important to have a product we can trust behind us so that we feel confident and secure," says Kristen. "CSC gives us both the technology and the people we need to do our jobs well."

Dave agrees.

"CSC helps us operate with confidence," he says. "We know we can ask questions, learn from their expertise, and get thoughtful answers. That's rare. And that's incredibly valuable."





CSC is the leading provider of Uniform Commercial Code (UCC) searches, filings, and online UCC portfolio management services for commercial banks of all sizes, factoring and accounts receivable organizations, capital finance companies, large leasing enterprises, and legal firms specializing in secured transactions.

Founded in 1899, CSC is the industry's most experienced provider, having served the UCC community for nearly six decades. We process millions of UCC searches and filings annually and monitor millions of UCC filings for expiration or continuation.

Through our proprietary online applications, our lender and law firm clients can search and file UCC records, manage and monitor their entire UCC portfolio, and navigate through the complexity of UCC filing rules to file accurately and securely every time.

For more information, visit **cscglobal.com/ucc**.