

# Everlaw

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## SOC 3 Report

Report on Everlaw's Description of its Everlaw Platform  
and on the Suitability of the Design and Operating  
Effectiveness of Its Controls Related to Security,  
Availability, Confidentiality, and Privacy Throughout  
the Period

March 1, 2024 to February 28, 2025



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## Acronym Table

➤ AICPA	American Institute of Certified Public Accountants
➤ API	Application Program Interface
➤ AWS	Amazon Web Services
➤ CEO	Chief Executive Officer
➤ ELK	Elasticsearch
➤ EU	European Union
➤ Everlaw	Everlaw, Inc.
➤ IT	Information Technology
➤ MFA	Multi-Factor Authentication
➤ OWASP	Open Web Application Security Project
➤ SOC	System and Organization Controls
➤ SQL	Structured Query Language
➤ UK	United Kingdom
➤ URL	Uniform Resource Locator
➤ US	United States
➤ VPC	Virtual Private Cloud
➤ ZAP	Zed Attack Proxy

# Section 1

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Assertion of Everlaw's  
Management



## Assertion of Everlaw's Management

We are responsible for designing, implementing, operating, and maintaining effective controls within Everlaw's Everlaw Platform throughout the period March 1, 2024 to February 28, 2025, to provide reasonable assurance that Everlaw's service commitments and system requirements were achieved based on the trust services criteria relevant to security, availability, confidentiality, and privacy (applicable trust services criteria) set forth in *TSP 100, 2017 Trust Services Criteria for Security, Availability, Processing Integrity, Confidentiality, and Privacy* (AICPA Trust Services Criteria). Our description of the boundaries of the system is presented in attachment A and identifies the aspects of the system covered by our assertion.

We have performed an evaluation of the effectiveness of the controls within the system throughout the period March 1, 2024 to February 28, 2025, to provide reasonable assurance that Everlaw's service commitments and system requirements were achieved based on the applicable trust services criteria. Everlaw's objectives for the system in applying the applicable trust services criteria are embodied in its service commitments and system requirements relevant to the applicable trust services criteria. The principal service commitments and system requirements related to the applicable trust services criteria are presented in attachment B.

There are inherent limitations in any system of internal control, including the possibility of human error and the circumvention of controls. Because of these inherent limitations, a service organization may achieve reasonable, but not absolute, assurance that its service commitments and system requirements are achieved.

We assert that the controls within the system were effective throughout the period March 1, 2024 to February 28, 2025, to provide reasonable assurance that Everlaw's service commitments and system requirements were achieved based on the applicable trust services criteria.

/s/ Megha Thakkar

Senior Director, GRC

Everlaw

April 9, 2025

## Section 2

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Independent Service Auditors' Report

## Independent Service Auditors' Report

To: Management of Everlaw

### Scope

We have examined Everlaw's accompanying assertion titled "Assertion of Everlaw's Management" (assertion) that the controls within Everlaw's Everlaw Platform (system) were effective throughout the period March 1, 2024 to February 28, 2025, to provide reasonable assurance that Everlaw's service commitments and system requirements were achieved based on the trust services criteria relevant to security, availability, confidentiality, and privacy (applicable trust services criteria) set forth in *TSP 100, 2017 Trust Services Criteria for Security, Availability, Processing Integrity, Confidentiality, and Privacy* (AICPA, Trust Services Criteria).

### Service Organization's Responsibilities

Everlaw is responsible for its service commitments and system requirements and for designing, implementing, and operating effective controls within the system to provide reasonable assurance that Everlaw's service commitments and system requirements were achieved. Everlaw has also provided the accompanying assertion about the effectiveness of controls within the system. When preparing its assertion, Everlaw is responsible for selecting, and identifying in its assertion, the applicable trust services criteria and for having a reasonable basis for its assertion by performing an assessment of the effectiveness of the controls within the system.

### Service Auditors' Responsibilities

Our responsibility is to express an opinion, based on our examination, on management's assertion that controls within the system were effective throughout the period to provide reasonable assurance that the service organization's service commitments and system requirements were achieved based on the applicable trust services criteria. Our examination was conducted in accordance with attestation standards established by the AICPA. Those standards require that we plan and perform our examination to obtain reasonable assurance about whether management's assertion is fairly stated, in all material respects.

We believe that the evidence we obtained is sufficient and appropriate to provide a reasonable basis for our opinion.

We are required to be independent and to meet our other ethical responsibilities in accordance with relevant ethical requirements relating to the examination engagement.

Our examination included the following:

- Obtaining an understanding of the system and the service organization's service commitments and system requirements.
- Assessing the risks that controls were not effective to achieve Everlaw's service commitments and system requirements based on the applicable trust services criteria.
- Performing procedures to obtain evidence about whether controls within the system were effective to achieve Everlaw's service commitments and system requirements based on the applicable trust services criteria.



Our examination also included performing such other procedures as we considered necessary in the circumstances.

#### **Inherent Limitations**

There are inherent limitations in any system of internal control, including the possibility of human error and the circumvention of controls. Because of their nature, controls may not always operate effectively to provide reasonable assurance that the service organization's service commitments and system requirements are achieved based on the applicable trust services criteria. Also, the projection to the future of any conclusions about the effectiveness of controls is subject to the risk that controls may become inadequate because of changes in conditions or that the degree of compliance with the policies or procedures may deteriorate.

#### **Opinion**

In our opinion, management's assertion that the controls within Everlaw's Everlaw Platform were effective throughout the period March 1, 2024 to February 28, 2025 to provide reasonable assurance that Everlaw's service commitments and system requirements were achieved based on the applicable trust services criteria is fairly stated, in all material respects.

CBIZ CPAs

*CBIZ CPAs P.C.*

Tampa, FL  
April 9, 2025



# Attachment A

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Everlaw's Description of the Boundaries of its  
Everlaw Platform

## System Description

### Company Overview and Services Provided

Everlaw, based in Oakland, California, with regional offices in New York, Washington, D.C and London, England, develops and manages the Everlaw Platform. Everlaw customers include legal firms, corporations, journalists, non-profit organizations and government entities engaged in litigation, investigations, data subject access requests and other types of large-scale document review and analysis projects or collaboration activities.

The Everlaw Platform is a modern, cloud-based eDiscovery and litigation platform that enables teams to process, manage, review, produce, and present electronically stored information in an efficient, powerful, and cost-effective manner. Storybuilder by Everlaw is a standalone collaborative tool for legal professionals that enables teams to organize documents and build cohesive narratives. Everlaw AI helps you better understand your data through its generative AI-powered Assistant. The platform allows you to accelerate document review by generating batch summaries and data extractions, finding answers to open-ended questions, and automatically categorizing documents with coding suggestions. It also enables the generation of insights from key documents using the Writing Assistant, with direct citations for easy verification. Leveraging generative AI, Everlaw AI enhances the efficiency and accuracy of reviewing, writing, and coding documents.

### Infrastructure

The Everlaw Platform is a cloud native and web browser-based SaaS technology platform that is accessed via the internet. The web application features file and document uploading via secure protocols, as well as feature-rich search, review, and collaboration functions for preparing a case, investigation, or other relevant workflow. The platform APIs enable seamless integration with other technology systems

### Amazon Web Services (AWS)

The system components that make up the Everlaw Platform are hosted within AWS data center facilities, specifically US (US East and West Regions), Canada (Central Region), Australia (Asia Pacific, Sydney Region), UK (London Region), and EU (Frankfurt Region). Each of these AWS regions hosts an independent installation of the Everlaw Platform in an isolated VPC. Each VPC is a multi-tenant environment that users access via a VPC-specific URL (app.everlaw.com, app.everlaw.ca, etc.). Everlaw relies on AWS to provide appropriate physical and logical protections and processes for the AWS data center facilities.

The Everlaw Platform components allow for the management and configuration of a project database and active projects that use the project database. The Everlaw Platform uses relational databases (MySQL and PostgreSQL) and AWS S3 buckets for storage.

### Storage

Private AWS S3 buckets store customer files that represent project case documents or user task output; they are organized by project case database.

### Management Subnet

Each VPC contains a management subnet that provides the Everlaw environment with security and management functionality. This includes logging and monitoring, vulnerability scanning, and other

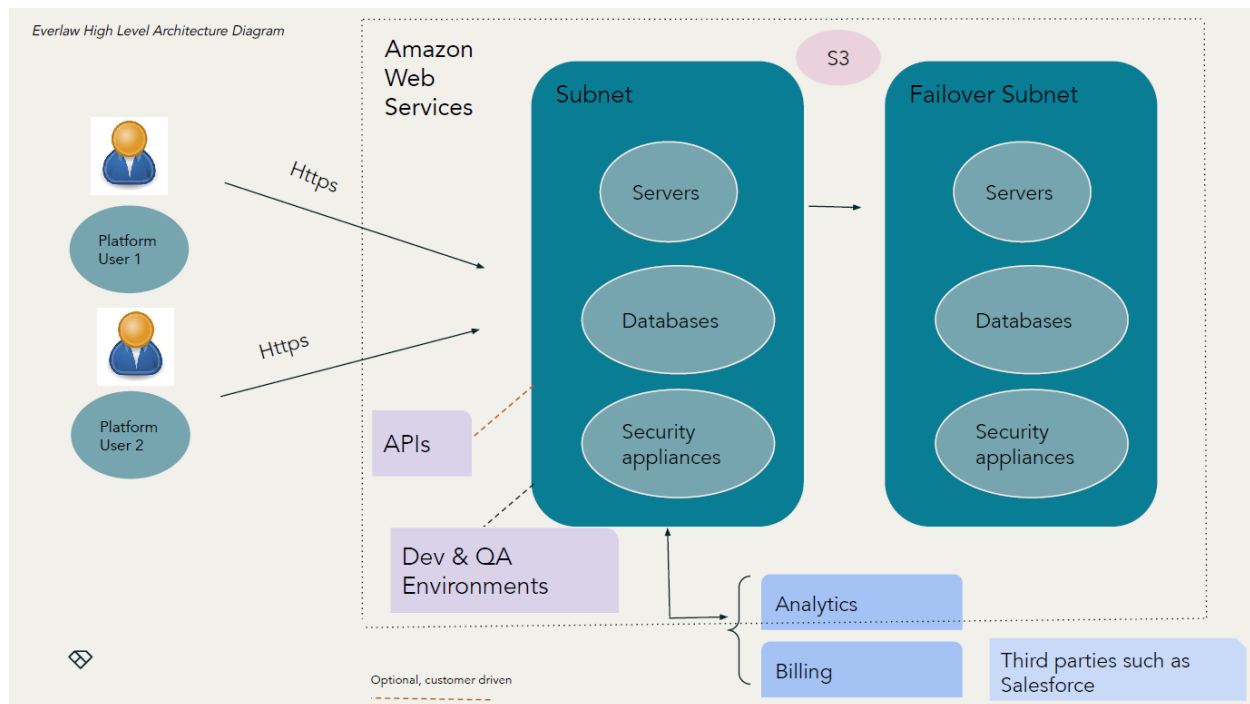
management tools. Access to this environment is strictly restricted to Everlaw personnel only, using encrypted channels and MFA.

### System Diagram/Boundaries

The system boundary includes a dedicated system interconnection with AWS that provides the underlying hardware and operational environment that powers the Everlaw Platform. Thus, the Everlaw Platform relies on AWS for the purposes of storing, processing, and transmitting customer data. Customers retain complete control and ownership of the customer data, which Everlaw processes on behalf of customers. The Everlaw Platform includes features that rely on external services. The external services include:

- Google Cloud Translate API
- Zendesk
- OpenAI

### System Diagram



## Locations and Infrastructure

Everlaw has the following key functions and locations which support the Everlaw Platform:

Function	Location
Business Operations, Corporate IT, and Security & Trust	Oakland, California (Headquarters) London (UK) Remote personnel (USA)
Engineering (including Software Development)	Oakland, California (Headquarters) Remote personnel (USA)
Security Engineering	Oakland, California (Headquarters) Remote personnel (USA)
Privacy and Legal	Oakland, California (Headquarters) Washington, DC

## Software

The following provides a non-exhaustive summary of services used to deliver (and support delivery of) the Everlaw Platform.

Component	Description
Operating Systems	Operating Systems used to support the Everlaw Platform are Linux
Data Stores	Customer data resides in AWS S3 bucket, SQL, MySQL and Search Index databases
Threat Management	Endpoint protection antivirus Continuous monitoring Incident Response Intrusion detection system
Security Event Logging	VPC-based logging of events (ELK) Centralized log management
Vulnerability Testing and Vulnerability Management	Vulnerability scans of major system components is performed by following tools: OWASP ZAP Nessus
Customer Support	Zendesk is used for customer service management and communications.
Code Repository	GitHub is used as a code repository for the application.

Component	Description
Incident Reporting and Management	Podio is used as an incident tracking and project management system. PagerDuty is utilized to alert and notify personnel of potential events. Bugsnap is used to notify personnel on a server error or when a user encounters a browser error using the website. Pingdom and Site24x7 are used to notify personnel of website downtime.
Customer Records Management and Billing	Salesforce is used for customer account creation, customer records management and billing.
Corporate Environment	Corporate Identity Management System: Okta is used for corporate identity and access management. Email and Document Management: Google Workspace is used for Company email and internal document management systems.

## People

Everlaw's CEO is responsible for leading the organization and managing the strategic operations of Everlaw. The CEO is committed to offering a secure product to Everlaw customers.

The following teams are in-scope for this report as their job responsibilities require that they have access to production systems, develop code to be included into the environment or support operational and advisory functions:

Team	Responsibilities Covered
Business Operations	Responsible for managing Facilities, Project Management Operations, Security and Trust, and Corporate IT teams.
People Operations	Responsible for recruitment, employee engagement, performance management, benefits administrations, People's team operations, and LED.
Engineering	Responsible for overseeing the development of new code, fixing bugs, release management process, and maintaining the engineering infrastructure that supports the Everlaw Platform.
Security Engineering	Responsible for creating and operating a secure platform that meets the security and compliance requirements and commitments. Security Engineering manages Application Security, Security Operations, Vulnerability Management, and Security Incident Response functions.
Legal	Responsible for and leads the Everlaw legal organization, which ensures that the company grows and scales in a way that takes into account all of the obligations and risks that face enterprises. The Legal organization includes Commercial, Corporate, Product, Corporate Compliance, Legal Operations, Privacy.

Team	Responsibilities Covered
Security & Trust	Security & Trust is responsible for creating, maintaining, and continuously improving the security, risk, security awareness and training, and compliance programs. The Security and Trust team also includes the Customer Trust function.
Product	Responsible for managing the product development lifecycle, including prioritization and feature definition, and the oversight of the design of the Everlaw Platform.
Customer Success	Responsible for managing Customer Success, Support and Data Operations, Training, User Research, and Customer Success Operations and Enablement functions.

## Data

As part of using the Everlaw Platform, users may create or upload documents, images, files, annotations, notes, tags or other electronic records relating to litigation or project matters. In the course of providing the service, Everlaw may also collect statistical data and performance information, analytics, meta-data or similar information, generated through instrumentation and logging systems, regarding the operation of the Everlaw Platform, including data about use of the service.

Data processing is initiated by direct ingestion into the Everlaw Platform, receipt of digital files, or by physical media in limited circumstances where a client chooses to send media to Everlaw. Data is processed within the Everlaw Platform, or at the relevant Everlaw office and uploaded to the Everlaw Platform, when necessary. Usage data and analytics can be exported directly by users or Everlaw personnel via the Everlaw Platform.

For current operational and management external services connections, Everlaw works with the external vendor to ensure appropriate protections are in place based on the service. Everlaw has appropriate contracts in place with the third parties to protect the service offering and customer content. For detailed subservice organization controls refer to section “Subservice Organizations”.

## Risk Assessment

Everlaw management performs an annual risk assessment, which requires management to identify risks in its areas of responsibility and to implement appropriate measures to address those risks. Everlaw’s management reevaluates the risk assessment annually to both update the previous results and to identify new areas of concern. The risk assessment process consists of the following phases:

- Identifying – The identification phase includes listing out risks (including threats and vulnerabilities) that exist in the environment. This phase provides a basis for all other risk management activities.
- Assessing – The assessment phase considers the potential impact(s) of identified risks to the business and its likelihood of occurrence.
- Mitigating – The mitigation phase includes putting controls, processes, and other physical and virtual safeguards in place to prevent and detect identified and assessed risks.

- Reporting – The reporting phase results in risk reports provided to managers with the necessary data to make effective business decisions and to comply with internal policies and applicable regulations.
- Monitoring – The monitoring phase includes Everlaw management performing monitoring activities to evaluate whether processes, initiatives, functions and/or activities are mitigating the risk as designed.

# Attachment B

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Principal Service Commitments and  
System Requirements



## Principal Service Commitments and System Requirements

Everlaw designs its processes and procedures related to its Everlaw Platform and Storybuilder by Everlaw (hereafter both together referred to as Everlaw Platform) to meet its service objectives. Those objectives are based on the service commitments that Everlaw makes to user entities, the laws and regulations that govern cloud service providers, and the financial, operational, security, availability, confidentiality, privacy, regulatory and compliance requirements that Everlaw has established for the services.

Security commitments to user entities are documented in customer agreements. Security commitments are standardized and include, but are not limited to, the following:

Security commitments to user entities are documented in the appropriate agreements. Security commitments are standardized and include, but are not limited to, the following:

- Security principles within the fundamental design of the Everlaw Platform that are designed to permit system users to access the information they need based on the permission of least privilege provisioning.
- Use of encryption protocols to protect data at rest and in transit.

Availability commitments to user entities are documented in appropriate agreements. Availability commitments are standardized and include, but are not limited to, the following:

- Managing capacity demand through the monitoring and evaluation of current processing capacity and usage rates.
- Meeting Company objectives through authorization, design, development, and monitoring of data backup processes and recovery infrastructure.

Confidentiality commitments to user entities are documented in appropriate agreements. Confidentiality commitments are standardized and include, but are not limited to, the following:

- Information is defined and classified into categories with associated periods.
- Data retention and disposal policies and procedures are documented and in place.

Privacy commitments to user entities are documented in appropriate agreements and in the privacy notice publicly posted on Everlaw's website. Privacy commitments are standardized and include, but are not limited to, the following:

- Personal data is stored, maintained, and utilized in accordance with the relevant agreements and publicly posted privacy notice.
- Data disclosures to third parties are permissible only to authorized third parties specified, and named in agreements and in the publicly posted privacy notice.
- Inquiries for access, deletion, and retention are fulfilled in accordance with the publicly posted privacy notice in a timely manner.