**Broadridge**®

# Build and publish data-intensive marketing collateral with DocuBuilder

## GAIN COMPLETE CONTROL OVER DOCUMENT PRODUCTION

• Streamline the quarter-end update process

• Facilitate collaboration with flexible, cloud-based workflows

• Publish outputs in multiple print and digital formats

• Ensure every document contains compliance-approved content

• Streamline document updating and versioning

• Maximize accuracy across every communication

## SYSTEMATIZE DOCUMENT CREATION

Asset management marketers work in a complex, fast-paced environment. Markets shift quickly, products evolve and new products emerge with increasing frequency. You want to focus on big ideas, but the accuracy and compliance of your product content can make or break success.
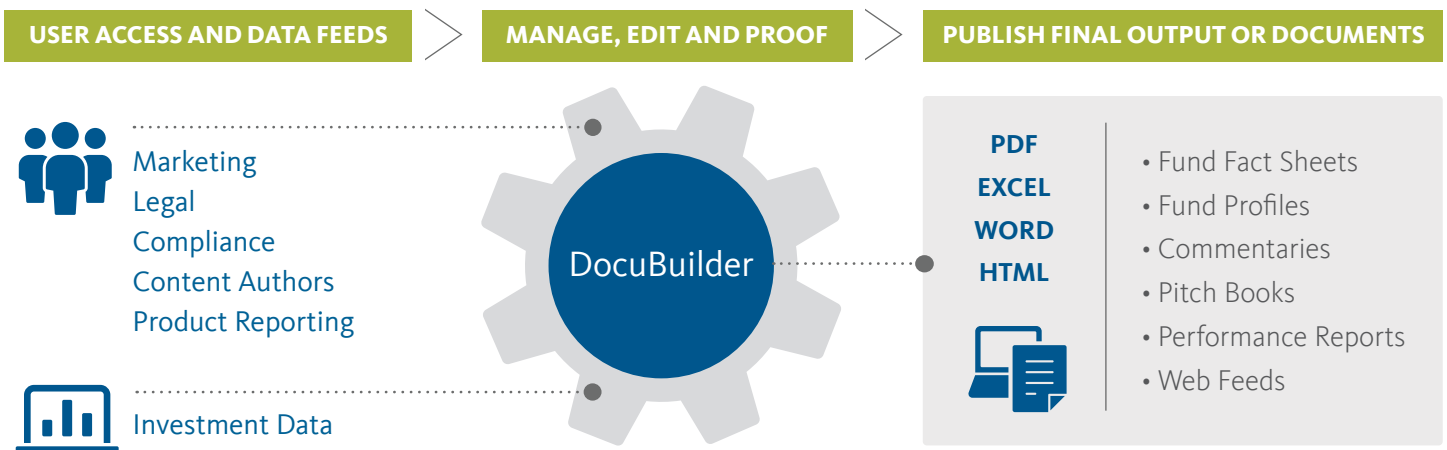
Now you can transform the way your team creates and updates complex and information-sensitive documents. DocuBuilder, our unique automated publishing solution, enables you to create, edit, re-purpose and publish time-sensitive materials with ease and efficiency. The key is breaking down content into small, reusable components including, sentences, paragraphs, data and tables.

## UPDATE ONCE, PUBLISH ANYWHERE

DocuBuilder connects these content components across documents and outputs. If you make a content edit to a single document, you are immediately able to identify other documents where this content is used, enabling you to update numerous documents simultaneously. Our platform eliminates tedious manual steps often necessary to keep content aligned across documents and outputs.

In only a few clicks, you can easily publish approved content across multiple channels and formats:

• Print- and web-ready PDFs
• Formatted HTML
• XML
• And more

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**USER ACCESS AND DATA FEEDS** > **MANAGE, EDIT AND PROOF** > **PUBLISH FINAL OUTPUT OR DOCUMENTS**

Marketing
Legal
Compliance
Content Authors
Product Reporting

Investment Data

DocuBuilder

PDF
EXCEL
WORD
HTML

• Fund Fact Sheets
• Fund Profiles
• Commentaries
• Pitch Books
• Performance Reports
• Web Feeds

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**ASSET MANAGEMENT SOLUTIONS**

## SIMPLIFY WORKFLOWS TO MAXIMIZE PRODUCTIVITY

Marketers must respond quickly to opportunities. But the sheer volume of content makes it hard to keep up. A single change to a fund may require you to create or update several fact sheets, fund profiles, pitchbooks and more.

Our cloud-based platform enables you to collaborate with confidence. Easily coordinate updates with product managers and distribution teams—as well as legal and compliance. Streamlined workflows reduce review-and-approval turnaround times, so you can get to market faster.

## DRIVE GREATER EFFICIENCY AT EVERY STEP

Your team shouldn't need to individually make hundreds of decisions about where content is going and how it should be used. Our intuitive interface enables you to easily create and apply business and presentation rules around every piece of content for any audience. In addition, you can surround content with meta tags, helping to automate and simplify document creation and content repurposing. Tag, link and reuse granular pieces of content and make changes to components without altering an entire document. Plus, edit one piece of information and it will instantly update across multiple channels.

# Make content work for you

## ACCESS DOCUBUILDER FROM ANY DESKTOP

Our web-accessed solution enables multiple users to collaborate to create, edit, approve and publish documents—while providing complete control at every step.

## SIMPLIFY THE PROCESS

Easily create, version or copy documents with a combination of content components, flexible data uploads and images for logos and photos.  Automatically render charts in multiple formats.

## TAKE CONTROL WITH PERMISSION-BASED ACCESS

Support multiple users and roles via administrative controls for information security.

## MAINTAIN PRECISE VERSION HISTORY FOR ALL PROOF CYCLES

Preserve document and content integrity, while creating a complete audit trail for accountability.

## PUBLISH FASTER

Generate multiple outputs from a single update. Create instant proofs in one click with web/print-ready PDF and other formats.

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DocuBuilder empowers clients to easily create, edit, package and deliver intelligent content from a central source, saving valuable time and resources.

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**BUILD AND PUBLISH KEY MARKETING COMMUNICATIONS**

Fact Sheets
Portfolio and Fund Profiles
Commentaries
Presentations
Performance Reports
Pitch Books
Web Feeds

**Discover how Broadridge can help you build and publish marketing collateral faster and easier than ever.**

Call 1 866 359 0456 or email john.closson@broadridge.com

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Broadridge, a global Fintech leader with over $4 billion in revenues and part of the S&P 500® Index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

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Ready for Next

Communications
Technology
Data and Analytics