

# Gain control over regulatory fund documents with DocuBuilder

## BUILD AND PUBLISH REGULATORY DOCUMENTS FASTER AND SMARTER

- Facilitate collaboration with our flexible, cloud-based application
- Ensure every document contains compliant content
- Streamline updating and versioning
- Publish outputs in multiple formats
- Reduce costs 30%–40% over manual processes
- Eliminate unpredictable charges for proofs, blacklining, alterations and pre-press setup

## SYSTEMATIZE DOCUMENT CREATION

Legal teams are under intense pressure to create and deliver timely, accurate documents in an increasingly complex regulatory environment. Now you can transform the way your teams collaborate to build and publish these detailed and information-sensitive documents.

DocuBuilder, our unique automated publishing solution, enables you to create, edit, repurpose 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. Expedite document creation and maximize accuracy by giving everyone on your team access to a single source of compliance-approved content.

## UPDATE ONCE, PUBLISH ANYWHERE

DocuBuilder connects content components across documents and outputs. If you make a content edit to a single fund document, you can immediately identify other documents where this content is used, then choose to update several documents simultaneously. Our platform eliminates the tedious manual steps often necessary to keep content aligned across documents and outputs, such as:

- Print- and web-ready PDFs
- XML
- Formatted HTML
- XBRL/iXBRL
- EDGAR II
- And more

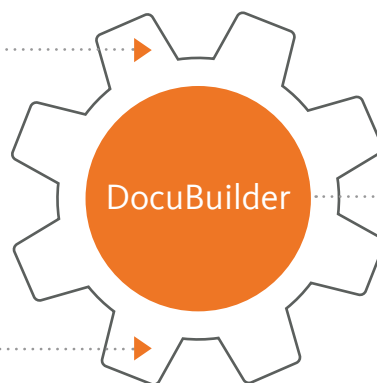
## USER ACCESS AND DATA FEEDS ► MANAGE, EDIT AND PROOF ► PUBLISH FINAL OUTPUT OR DOCUMENTS



Legal  
Paralegals  
Content Authors  
Fund Administration  
Outside Counsel



Investment Data



PDF  
EXCEL  
WORD  
EDGAR  
XML  
XBRL/iXBRL  
HTML



- 40 Act Fund & UCITS Prospectuses
- SAs
- Summary Prospectuses
- Proxies
- Exhibits
- Supplements
- Private Placement Memos
- Shareholder Reports

# 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—providing complete control at every step.



## SIMPLIFY DOCUMENT CREATION

Easily create, version or copy documents with a combination of content components, flexible data uploads and images for logos and photos. Automatically render charts and generate tables of contents. Analyze and quickly compare disclosures against peers using our compliance analytics tool.



## 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 increased accountability.



## PUBLISH FASTER

Generate multiple outputs from a single update. Create instant proofs in one click with web/print-ready PDF output and EDGAR II R-tags.

DocuBuilder empowers users to easily create, edit and package regulatory communications and EDGAR filings, saving valuable time and resources.

## INCREASE iXBRL USER CONTROL AND OVERSIGHT. CUT DAYS OUT OF YOUR PROCESS.

### TAG

Utilize auto-tagged components that persist year over year.

### PROOF

Generate iXBRL proofs with a click; view via integrated SEC Arelle viewer.

### VALIDATE

Flag inconsistencies and bad or missing tags automatically before filing.

### CONSOLIDATE

Combine iXBRL files into a single package in seconds; view and submit to the SEC.

### FILE

Self-file or outsource to our Managed Services team; either way, we have you covered.

## DISCOVER HOW BROADRIDGE CAN HELP YOU GAIN GREATER CONTROL OF YOUR REGULATORY DOCUMENTS

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Broadridge, a global Fintech leader with over \$5 billion in revenues, provides the critical infrastructure that powers investing, corporate governance and communications to enable better financial lives. We deliver technology-driven solutions that drive business transformation for our clients and help them get ahead of today's challenges to capitalize on what's next.

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