

Donnelley Financial Solutions and Equity Trustees Join Forces to Transform Fund Document Management and Workflow

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SYDNEY--(BUSINESS WIRE)-- Donnelley Financial Solutions (NYSE: DFIN), a leading global provider of innovative software and services for the creation, production and distribution of compliance documents to investors and regulators, is collaborating with Equity Trustees, one of Australia's largest independent trustee companies, to implement its new document and content management system and workflow tool.

Leveraging on expertise gained from thousands of clients worldwide, Donnelley Financial Solutions will significantly enhance how Equity Trustees create and manage their documents. As the Trustee for more than 200 funds, Equity Trustees currently produces more than 400 offer documents, the majority of which contain important financial information relating to the performance of investments.

Last month Equity Trustees decided to incorporate FundSuiteArc, a content management and workflow system developed by Donnelley Financial Solutions.

FundSuiteArc gives users the ability to store and manage information in a central, online repository so disclosure and regulatory documents can be easily edited and published for display on the web, for print and for submission to global regulators. The platform provides a streamlined offer document process to replace the previous manual process to create documents.

By implementing the new system, Equity Trustees is able to ensure consistency and accuracy in documentation, an improved verification and approval process, built-in audit trails and significant efficiency gains. It enables seamless updates across multiple offer documents and a quicker path to market with up to date information.

"An additional benefit of the new platform is that it paves the way for improved client services, with the ability for documents to be accessed by clients and authorised stakeholders through cloud-based media," says Harvey Kalman, Executive General Manager, Corporate Trustee Services.

Harvey added, "This is all about providing an improved service to our clients through harnessing the most up to date tools available in the market to help us do our job as efficiently as possible. We anticipate a reduction on the costs of producing documents as less time will need to be spent formatting, checking and will streamline our workflow considerably."

Colm Carey, who heads up Donnelley Financial Solutions' business development efforts in Australia, shared some insights, "We are taking a collaborative approach to this project, working closely alongside the teams at Equity Trustees to advise on areas where we can streamline content, develop custom workflows, and implement industry best practices."

"One example where we are adding significant value through this process is in helping the Equity Trustees' team to share text across multiple documents. Our experts will work with Equity Trustees to analyse their document library and drive efficiencies and consistency."

The FundSuiteArc platform includes an integrated, automated tool to handle document creation, including content management, collaboration and workflow and publishing. FundSuiteArc was created specifically to meet the needs of the fund investment community, providing the ability to quickly and easily create, manage and publish fund communications in any language.

For more information, please contact: Colm Carey via email: colm.carey@dfsco.com or phone: +61 2 9199 8719

About Donnelley Financial Solutions

Donnelley Financial Solutions (NYSE: DFIN) provides software and services that enable clients to communicate with confidence in a complex regulatory environment. With 3,500 employees in 61 locations across 18 countries, we provide thousands of clients globally with innovative tools for content creation, management and distribution, as well as data analytics and multi-lingual localization services. Leveraging advanced technology, deep-domain expertise and 24/7 support, we deliver cost-effective solutions to meet the evolving needs of our clients. For more information about Donnelley Financial Solutions, visit dfsco.com.

About Equity Trustees

Equity Trustees was established in 1888 to provide independent and impartial trustee and executor services to help families throughout Australia protect their wealth. As one of Australia's largest listed independent trustees, the company offers a diverse range of services to

individuals, families and corporate clients including aged care advice, asset management, estate planning, philanthropic services and responsible entity services for external fund managers. Equity Trustees Limited is a wholly owned subsidiary of EQT Holdings Limited, a public company listed on the Australian Securities Exchange (ASX: EQT).

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