



## DFIN CASE STUDY

How we helped the UK's leading retirement communities company execute complex deals

Venue  
by **DFIN**

**McCARTHY STONE**  
*Life, well lived*

## CORPORATE SNAPSHOT

# McCarthy Stone transforms natural resources into prosperity and sustainable development



**Founded  
in 1977**

To provide retirement housing development and services



**475  
developments**

close to attractions and amenities across the UK



**20,000  
people**

making a home in retirement and lifestyle properties

## CHALLENGE

# Executing complex financial transactions

McCarthy Stone is a dynamic company with sophisticated needs for sharing sensitive data with many stakeholders. The company initially needed a virtual data room with expert deal support to manage the complexity of taking the company public on the London Stock Exchange.

Later, in groundbreaking transactions for their industry, they needed data rooms to sell properties to investors and take the company private through private equity investment.



## SOLUTION

# Venue makes complex transactions straight forward with expert deal support

Successfully completing deals involves more than operating a virtual data room. It requires the participation of deal experts with a willingness to work with clients and provide the best possible service and support. After years of leveraging Venue to complete financial transactions, McCarthy Stone is now piloting DFIN's Data Protect Solutions to respond to Data Subject Access Request (DSARs) by automatically locating and redacting personal information (PI) to increase efficiency and control costs.



**LOCAL SUPPORT EXPERTS**  
24/7 access to country-specific experts



**MODERN INTUITIVE SOFTWARE**  
Simple enough for anyone to use without training



**PORTFOLIO OF SOLUTIONS**  
Software and services create a one-stop-shop



Venue

The virtual data room built for deals

Data Protect Solutions

Locate. Secure. Control.



The DFIN team is very approachable and delivers high-quality service and support. Their willingness to work with us to achieve the best outcomes is highly valuable. Of course, it helps that Venue makes everything so easy to do. New data rooms are ready the same day they are needed and offer lots of structure and user onboarding options. Convenient drag-and-drop uploads of directories, folders, and files make it possible for anyone to manage data room contents.”

**ANNA BROWN**

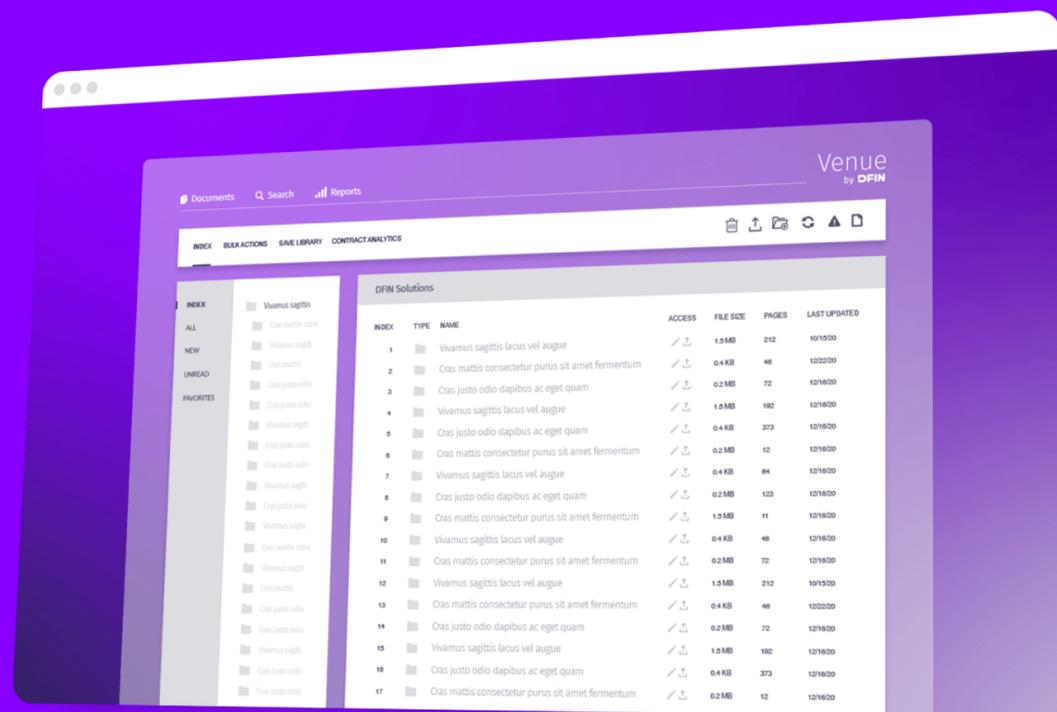
Director of Strategic and Corporate Finance  
McCarthy Stone





# The virtual data room built for deals.

Accelerate your deal process securely with our award-winning virtual data room. Our purpose-built virtual data rooms are reinforced by our regional experts and continually optimized for security, productivity, and usability.



## AFFORDABLE SOLUTION

Saves money with transparent pricing for a complete solution



## CONVENIENT

Lightning-quick set up with simple bulk uploads and folder views



## SECURE

Protects data with encryption, watermarking, and anti-malware scans



## EFFICIENT WORKFLOWS

Streamlines to save time, accelerate progress, and schedule reporting



## INTELLIGENT INSIGHT

Delivers instant reporting on viewed content with real-time analytics



## EXPERT RESOURCES

Leverages regional project manager and 24/7/365 client services



# Get in touch

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