



PRODUCTS & SOLUTIONS | ARCPRO | ARCREPORTING

Helping CITs Efficiently Manage Regulatory Document Production

Automated solutions seamlessly produce CIT summary plan documents & reports

Collective Investment Trusts (CITs), also known as Commingled Funds, Collective Trust Funds (CTFs) and A2 Funds, are experiencing tremendous growth. As a result, it is becoming increasingly difficult for financial services companies to create, manage and produce the required summary plan documents, disclosures and reports internally. If your firm is developing CIT regulatory documents manually, it may be time to seek out an automated platform that will better manage this complex, time-consuming task.

The Solution: ArcPro® and ArcReporting®

Put to work an end-to-end shared content management solution for all your CIT disclosure and regulatory document needs. ArcPro and ArcReporting automate their creation by allowing you to store and manage information in a central, online repository. They are the most effective ways to assemble and streamline the process of editing and publishing these documents while delivering greater consistency, efficiency, accuracy and flexibility.

CITs benefit from these ArcPro and ArcReporting features:

- **Provide real-time, consistent, shared content updating across all documents**, which leads to less risk and more time savings.
- **Perform as true content management applications**, yielding rich content libraries that streamline future audits and simplify research.
- **Leverage variable content** to adjust language when necessary or appropriate.
- **Maintain strong version control and audit trail**, thereby recording all changes.
- **Produce highly stylized compliance output** that allows firms to maintain a professional image.
- **Offer simple, accurate and thoughtful implementation** that utilizes a streamlined workflow to better manage the updating process.

Is your company already using ArcPro or ArcReporting for mutual funds?

If your organization uses DFIN for its mutual funds, you can easily utilize the platform for CIT regulatory document creation and production too. We understand that while there are commonalities between mutual funds and CITs, there are nuances to each investment vehicle that drive the need for different filing and reporting requirements and processes. That's why we built ArcPro and ArcReporting to service both.

Turn to DFIN for easy, accurate and compliant CIT document production for three important reasons:

- 1** Both platforms were purpose-built for the financial industry and have been widely embraced by fund companies, banks and asset managers across the globe.
- 2** Thousands of clients rely on DFIN know-how — there are over 11,000 funds on ArcPro alone today.
- 3** DFIN provides world-class expertise — because content management is already in our wheelhouse, we have the experience clients want and need.

About Donnelley Financial Solutions (DFIN)

DFIN is a leading global risk and compliance company.

We're here to help you make smarter decisions with insightful technology, industry expertise and data insights at every stage of your business and investment lifecycles.

As markets fluctuate, regulations evolve and technology advances, we're there. And through it all, we deliver confidence with the right solutions in moments that matter.

Learn about DFIN's end-to-end risk and compliance solutions

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