



FACT SHEET | PROXY FOR INVESTMENT SOLUTIONS

The Perfect Partnership to Power Your Fund Proxies

Donnelley Financial Solutions (DFIN) and BetaNXT offer the industry's only single-source solution for start-to-finish fund proxy services.



Our clients have access to leading-edge technology and an established global distribution network, backed by a team of dedicated experts. The result? A powerful solution that engages your shareholders and simplifies your fund proxy management.

Everything you need — all in one place

Boost shareholder engagement and strengthen your brand, while streamlining the proxy process and minimizing costs. All this from a single, intuitive platform.

- Access a single point of contact backed by an expert team of project managers to help you plan your entire event, from discovery to post-proxy review.
- Enhance investor experience and shareholder support with BetaNXT's technology-driven call center technology and a customized solicitation campaign.

- Minimize your print, paper and postage costs when you take advantage of an integrated, worldwide print and distribution network.
- Get insights into the success and compliance of your event with real-time voting results and regulatory reporting data in an online analytics dashboard.

Get customized expert support at every step of your fund proxy event

DISCOVERY, PLANNING AND IMPLEMENTATION

- Engage with a team of experts to plan your proxy event and establish goals.
- Get in-depth analysis of your timeline, pre-record date data and budget preparation.
- Work with a single point of contact.
- Have a dedicated campaign and relationship manager on your side throughout the process.
- Maintain control of both your data and your event with secure file transfer protocols and procedures.

PRINT AND MAIL MANAGEMENT

- Minimize your print, paper and postage costs with a scalable and integrated print and distribution network.
- Gain access to enhanced mail and eDelivery capabilities across the globe.
- Distribute to all shareholders custom branded materials produced in-house by the largest financial printer in North America.
- Provide online hosting of materials for easy shareholder review.

SOLICITATION

- Work with BetaNXT's technology-driven call center, which will implement strategic, customized outreach campaigns to help ensure capture of the votes necessary to pass critical proposals on time.
- Save time and costs when you allow expertly trained inbound and outbound agents to handle solicitation and proxy event questions.
- Reduce campaign expenses with electronic delivery options and solicitation data analysis.

TABULATION

- Easily manage your successful proxy event and ensure you capture enough votes to pass critical proposals on time.
- Get real-time vote tracking and results through an intuitive, web-based dashboard.
- Ensure your proxy material is customized and marketed professionally to maximize shareholder engagement.
- Access in-depth data analytics and vote modeling.

SHAREHOLDER MEETING AND POST-MEETING REVIEW

- Offer branded mobile and web-based voting through convenient BetaNXT platforms to help maximize shareholder participation with multiple touchpoints.
- Get real-time vote tracking and results through an intuitive web-based dashboard.
- Access in-depth data and vote modeling.

A fund proxy solution focused on the critical steps for success.

1 Discovery, Planning
and Implementation

2 Print and Mail
Management

3 Solicitation/
Call Center

4 Tabulation
Services

5 Shareholder Meeting/
Post-Meeting Review

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

Visit DFINsolutions.com | Call us [+1 800 823 5304](tel:+18008235304)