



# FAQ: Understanding the Benefits of ArcFlex

This document is designed to answer common questions about ArcFlex, DFIN's newest software solution. Whether you're new to ArcFlex or exploring how it can support your reporting workflows, this FAQ provides clear, practical insights into what ArcFlex does, who it's for, and how it can help your organization.

## Q. What is ArcFlex?

A. ArcFlex is DFIN's cloud-based reporting platform designed to help investment companies create, manage, and generate regulatory financial reports with greater speed, accuracy, and control.

## Q. Who is ArcFlex designed for?

A. ArcFlex is tailored for fund administrators and asset managers as they prepare regulatory documents for alternative investments, including hedge funds, private equity funds, interval and tender offer funds, BDCs, and other registered and unregistered fund companies.

## Q. What types of documents can ArcFlex produce?

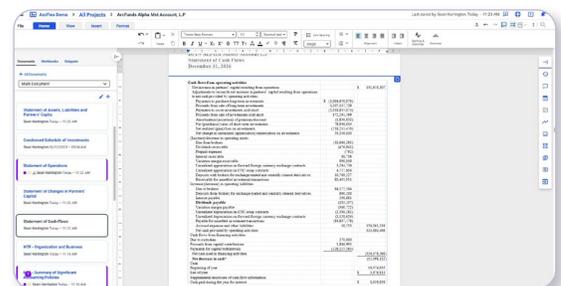
A. ArcFlex supports annual and quarterly reporting, private and alternative investments reporting, closed-end fund reporting, proxy reports, Schedules 13D and 13G, and short-form and other ad hoc documents.

## Q. How does ArcFlex simplify regulatory reporting?

A. ArcFlex centralizes reporting in one workspace with collaboration, content reuse, automated updates, versioning, and flexible output formats to manage complexity and regulatory demands.

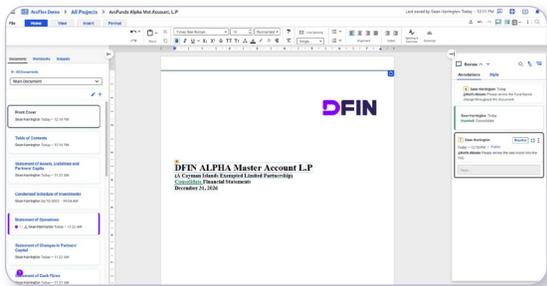
## Q. How does Excel integration work?

A. Users can link data, charts, tables, and formulas directly into ArcFlex and refresh Excel data across multiple documents instantly.



## Q. Can teams collaborate inside ArcFlex?

A. Yes. ArcFlex supports real-time co-editing, task assignments, comments, versioning, and sign-off workflows.



## Q. How does ArcFlex support consistent disclosures?

A. Standardized content can be created once and reused across funds. Updates flow automatically wherever used. Users can leverage Excel files as well to create content that can be shared across multiple documents.

## Q. What output formats does ArcFlex support?

A. ArcFlex exports to Word, PDF, HTML, and PowerPoint.

## Q. How does ArcFlex help maintain compliance?

A. Features such as the ability to set due dates and sign-off workflows, audit trails of changes, version control, comparison tools, and role-based access help users maintain compliance.

## Q. What security measures does ArcFlex offer?

A. ArcFlex offers SOC 2 Type II, MFA, SSO, encryption, role-based access, and detailed audit logs.

## Q. Is ArcFlex difficult to implement?

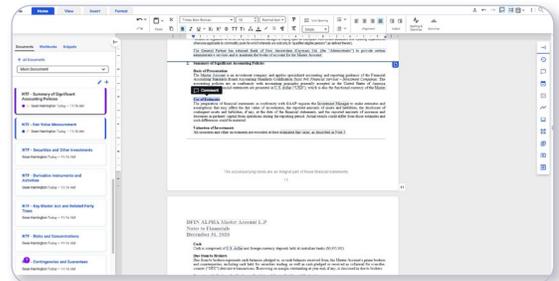
A. No. ArcFlex offers smooth onboarding with minimal disruption and a familiar UX/UI. Users can utilize existing Word and Excel files to speed the onboarding of ArcFlex.

## Q. Can I import Word files into ArcFlex?

A. Yes. Users can import Word documents and continue editing within ArcFlex.

## Q. What editing capabilities are available?

A. ArcFlex supports flexible editing, including headers/footers, page breaks, snippets, templates, and formatting tools.



## Q. Does ArcFlex automate version control?

A. Yes. Every edit is auto-versioned with comparison and restore options.

## Q. How does ArcFlex reduce reporting errors?

A. Centralized content, Excel linking, and automated tracking minimize inconsistencies.

**Q. Does ArcFlex support iXBRL tagging?**

A. Yes. ArcFlex includes intelligent iXBRL tagging with optional support from DFIN experts.



**Q. Can ArcFlex manage multiple funds?**

A. Yes. ArcFlex is built to support organizations managing many funds with content reuse and data linking.

**Q. Does ArcFlex support task management?**

A. Yes. Task assignments, notifications, and approval workflows are built in.

**Q. How does ArcFlex integrate with existing workflows?**

A. ArcFlex preserves Excel-based calculation logic and enhances existing processes.

**Q. Is ArcFlex scalable?**

A. Yes. As a cloud-based solution, ArcFlex scales with your business needs.

**Q. Does ArcFlex help prepare EDGAR-ready output?**

A. Yes. ArcFlex supports formats that meet SEC and SRO requirements, including EDGAR.

**Q. Can ArcFlex generate presentations?**

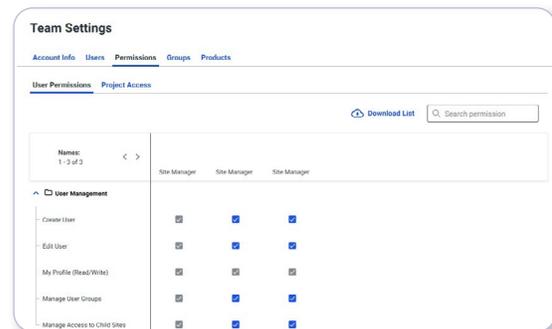
A. Yes. ArcFlex builds polished PowerPoint presentations using linked financial data.

**Q. Does ArcFlex require heavy IT involvement?**

A. No. It requires minimal IT resources because DFIN manages hosting and maintenance.

**Q. Can ArcFlex support multiple teams?**

A. Yes. Role-based permissions allow secure collaboration across teams within one organization or across multiple organizations.



---

## Why DFIN?

As a trusted partner, DFIN supports more than 20,000 funds worldwide — including private equity, alternative investments, hedge funds, variable products, mutual funds, ETFs, CTFs, and SICAVs. ArcFlex is backed by the service, support, experience, and expertise of an established leader in the financial industry. With our knowledge of regulatory requirements and change readiness, our thought leadership can help you reduce compliance risk.

---

### **About Donnelley Financial Solutions (DFIN)**

DFIN is the leading global provider of compliance and regulatory software and services, fueling end-to-end investment company regulatory compliance needs, complex capital markets transactions, and essential financial reporting at every stage of the corporate lifecycle. Our mission is simple: to empower clients with the software and support they need to stay ahead of public company filings, investment company filings, private reporting, and beneficial owner reporting, while enhancing workflow efficiency. We bring deep expertise to every engagement, driving transparency and collaboration built on confidence and reliability.

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

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