

## Efficient Product Disclosure for Investment Managers

**A proven approach to improving efficiency and delivering governance to the process of authoring, verifying and publishing disclosure documents.**

### HIGHLIGHTS

**Centralise the creation and ongoing management** of your disclosure documents within a single, secure and fully audited system.

**Ensure consistent content** by automatically incorporating changes across all products and brands through all channels (print and digital).

**Access the latest versions** of updates, legal opinions and commentary "at a glance" when approving content.

**Make real time amends and produce print ready PDFs** instantly, negating the lead times and cost associated with design agencies.

### OPERATIONALISE PDS PRODUCTION

Reduce time spent drafting, reviewing and producing large volumes of PDS through collaborative authoring, workflow controls and robust verification controls.

### EFFICIENCY COMBINED WITH ROBUST GOVERNANCE

A high proportion of PDS content is common across multiple investment options, however, existing authoring practices often result in an ongoing challenge in maintaining focus and consistent content. Objective Keystone enables you to centrally define and manage this common content freeing up key resources to focus on the management of variable content and the associated verification processes.

Approval processes are often circuitous, involving the management and collaboration of numerous parties with conflicting requirements. Defining the ownership of document content, combined with robust workflow management drives efficiencies in the authoring, verification and sign-off disclosure documentation.

Maintaining verification documentation is onerous and poses a business risk over the longer term without robust governance. Objective Keystone verification feature enables the automation of the verification process with archiving of supporting documentation enabling external parties to remotely verify content and archive supporting documentation.

### WHY THIS SOLUTION?

Objective Keystone has been designed to support the needs of Financial Services Organisations in the authoring, collaborative approval and verification of high volumes of disclosure documents with the goal of driving business efficiencies through robust governance practices.

## KEY ATTRIBUTES

### Collaborative update and verification

The entire product disclosure update and verification process is delivered through a single, intuitive and highly secure browser based interface, accessible 24/7 on any device to any approved stakeholder, internal or external. Collaboration in the process has never been easier, or more secure.

### Collaborative authoring

Product Managers, Subject Matter Experts and others work collaboratively on a single, master disclosure document. Sections can be assigned to individuals and locked for editing. Sections, paragraphs and even spreadsheet cells can be version control and all changes are audited.

### Legal Reviews

Legal Reviews form the basis for key decisions during the verification process. Internal and external legal entities can easily and directly deliver advice on specific sections of the disclosure document which is then permanently associated with that section.

### Verification Assurance

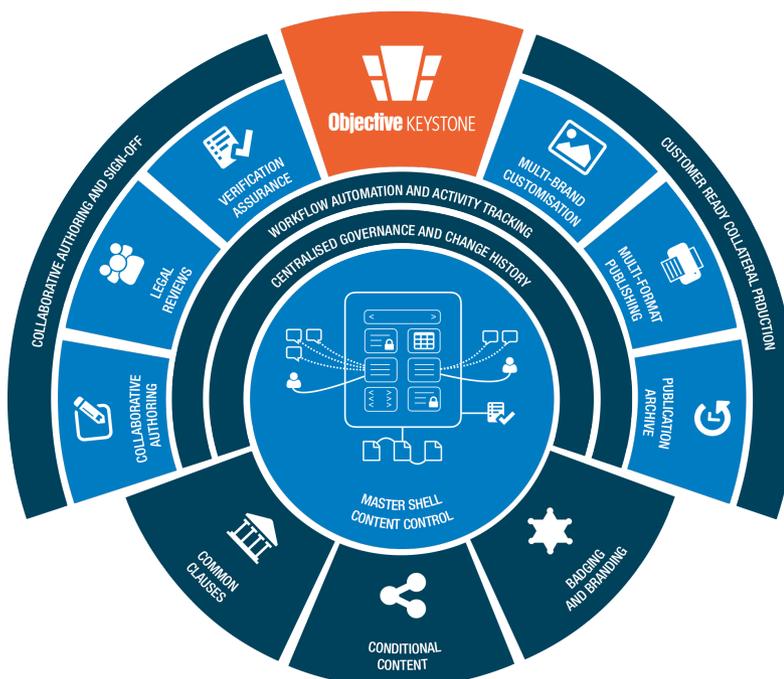
Verification Certificates are automatically generated, ready for signature and contain direct links to the appropriate section of the documents, legal and other commentary associated with that section and any other relevant supporting information.

### Smart Clause Bank

Common content can be defined centrally, verified in isolation of a product role and maintained in the Clause Bank. This allows for a consistent, corporate voice and dramatically reduces authoring and verification effort during product rolls.

### Market-Ready Disclosure Collateral Production

Traditionally, disclosure document content, once verified, is delivered to a design function - either internal or, more often, external. As well as being costly, this approach is also error prone and therefore risky. Utilising the built in publication engine, organisations can substantially reduce cost and ensure that all published information is sourced directly from the most up to date verified source content.



**Style Specifications**

Brand templates and styling specifications can be maintained within the publishing engine and automatically applied to the verified disclosure content.

**Multi-Brand Customisation**

The same product disclosure information can be automatically repurposed across multiple product family variants, across multiple sub-brands and also across 'bespoke' client offerings with the only variation in the output being branding, badging, product fees and performance data.

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**Single Master Shell Document Creation and Control**

The use of a single "Master Shell" to author, review and verify disclosure documents delivers massive organisational efficiencies and substantially reduced risk. SME's can be assigned individual sections of the same document for updating while legal parties can be given access to individual sections to provide comprehensive review and legal advice. Disclosure document variants (for sub-brands or key clients) are catered for using placeholder variables populated, at publication time from the specific product database. Crucially, every change made is audited and all previous versions of documents or sections is easily accessible in the Archive.

**Roll Automation and Activity Tracking**

The built in workflow engine enables automated task assignment and activity tracking throughout the entire product roll cycle, from initial kick off meeting to in-force. This frees up Product Managers from administrative duties to focus on real product innovation.

**Centralised Governance**

Centralising governance delivers both efficiency and compliance benefits to an organisation. From common content identification and extraction through to comprehensive audit of every action as well as maintenance of historic versions of documents and supporting disclosure artefacts.

**ABOUT OBJECTIVE CORPORATION**

Objective creates information and process governance solutions that are effortless to use and enable organisations to confidently advance their own digital transformation.

Designed for regulated industries, these solutions turn the imperative of compliance, accountability and governance into an opportunity to streamline business processes and deliver the innovative services that customers expect.

With a heritage in [Enterprise Content Management \(ECM\)](#), Objective's expanded solutions extend governance across the spectrum of the modern workplace; underpinning information, processes and collaborative work-spaces.

Through a brilliant user experience, people access the information they need to progress processes from wherever they choose to work.