



DFIN CASE STUDY

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

DFIN
Venue®

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

The screenshot displays the DFIN Venue software interface. At the top, there is a navigation bar with 'Documents', 'Search', and 'Reports' tabs. Below the navigation bar is a toolbar with icons for file operations like 'New', 'Open', 'Save', and 'Print'. The main area is titled 'DFIN Solutions' and contains a table of documents. The table has columns for 'INDEX', 'TYPE', 'NAME', 'ACCESS', 'FILE SIZE', 'PAGES', and 'LAST UPDATED'. The data in the table is as follows:

INDEX	TYPE	NAME	ACCESS	FILE SIZE	PAGES	LAST UPDATED
1		Vivamus sagittis		1.5 MB	212	10/15/20
2		Cras mattis		0.4 KB	48	12/22/20
3		Vivamus sagittis		0.2 MB	72	12/16/20
4		Cras mattis		1.5 MB	182	12/16/20
5		Cras justo odio		0.4 KB	373	12/16/20
6		Vivamus sagittis		0.2 MB	12	12/16/20
7		Cras mattis		0.4 KB	64	12/16/20
8		Vivamus sagittis		0.2 MB	123	12/16/20
9		Cras mattis		1.5 MB	11	12/16/20
10		Vivamus sagittis		0.4 KB	48	12/16/20
11		Cras mattis		0.2 MB	72	12/16/20
12		Vivamus sagittis		1.5 MB	212	10/15/20
13		Cras mattis		0.4 KB	48	12/22/20
14		Vivamus sagittis		0.2 MB	72	12/16/20
15		Cras mattis		1.5 MB	182	12/16/20
16		Vivamus sagittis		0.4 KB	373	12/16/20
17		Cras mattis		0.2 MB	12	12/16/20

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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

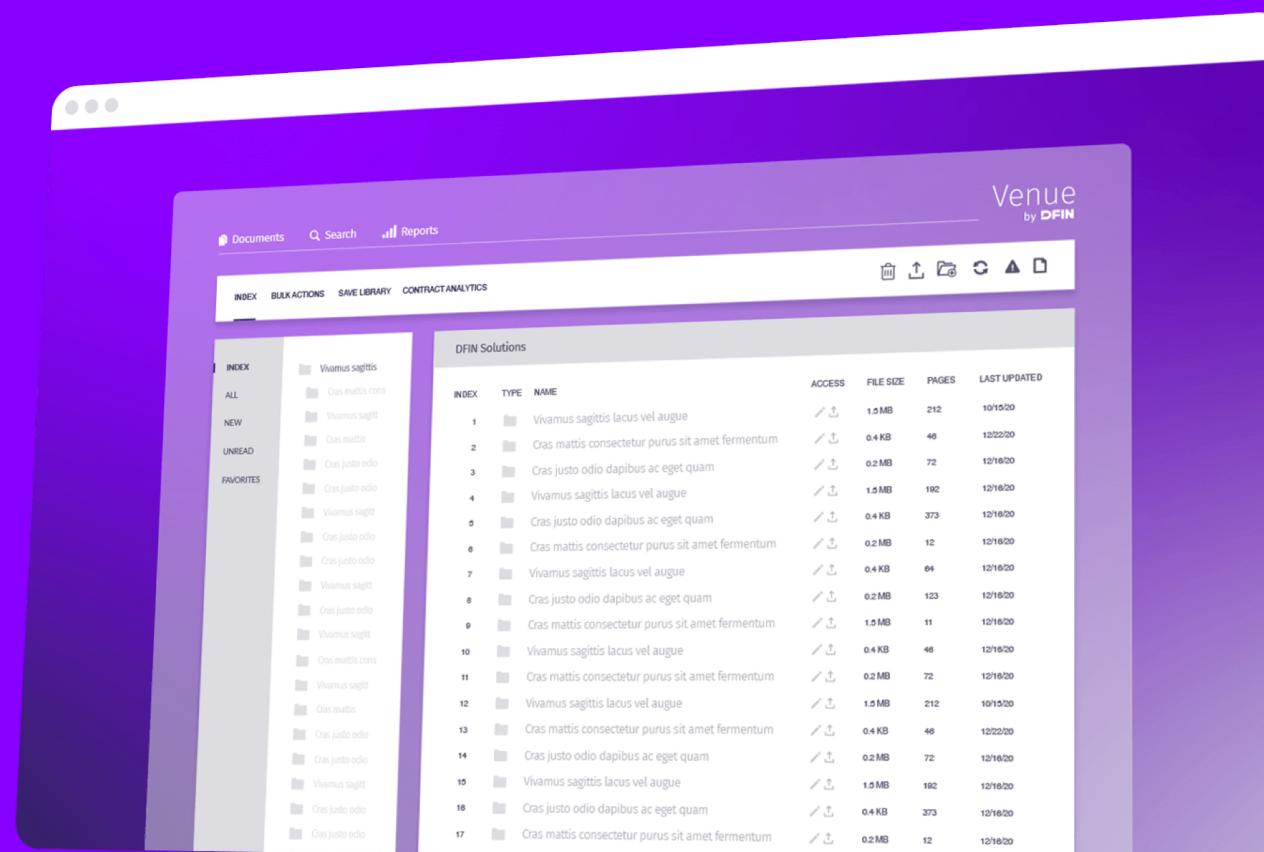




Venue®

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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