



## DFIN CASE STUDY

How we helped a  
medical technology  
company collaborate  
on proxy statements

**DFIN**  
ActiveDisclosure

 **STAAR**<sup>®</sup>  
SURGICAL

## CORPORATE SNAPSHOT

**STAAR Surgical (NASDAQ: STAA) designs, develops, manufactures and markets implantable lenses for the eye and companion delivery systems.**



**Founded in 1982**  
Headquartered in California



**13% growth**  
2024 versus 2023



**\$322M net sales**  
Fiscal year 2023

## CHALLENGE

# Making it easier for legal and finance teams to work together

STAAR Surgical was successfully using ActiveDisclosure for financial reporting and SEC filing, and greatly benefited from the easy-to-use and time-saving collaboration it enabled among its financial team.

They wanted to experience similar benefits during their proxy disclosure projects involving legal staff, financial staff and others.



## SOLUTION

# Use ActiveDisclosure for proxy statements

STARR Surgical was already using ActiveDisclosure for preparing and filing SEC Forms 8-Ks, 10-Qs and 10-Ks, so using it for proxy statements was a natural next step. DFIN is continuously innovating its solutions, and recent enhancements further expanding content design, layout, and styling capabilities made it possible for STAAR to upgrade its proxy disclosure with ActiveDisclosure software backed by DFIN project management and subject matter experts.



### EASY-TO-USE COLLABORATION FEATURES

Securely share document access with internal and external users.



### MODERN DESIGNS WITH IMPRESSIVE GRAPHICS

Multi-column formats, advanced text styles, graphical charts and more.



### FAMILIAR USER INTERFACE FOR TEAM MEMBERS

Links to Excel for financial staff and works like Word for legal staff.

In our opinion, the unaudited interim condensed consolidated financial statements contain all adjustments (consisting of only normal recurring adjustments) necessary to present fairly, 

010-Cover

Josh Duncan Today - 11:16 AM 

030-Balance Sheets

Stan Smith Today - 9:55 AM

040-Statements of Operations

Amy Flannery Today - 12:29 AM

Do you want to replace this workbook?

Original

Updated

11 Tables

11 Tables

105 Items

105 Items

### Assets

Current Assets:

Cash

Accounts receivable

Prepaid expenses

Total current assets

“

ActiveDisclosure has helped improve our public reporting and disclosure efforts by making it easier for the legal and financial reporting teams to collaborate. Working together on a document in the platform, while sharing ideas and reviewing each other's work, drives better results.”

“Now, doing our proxy in ActiveDisclosure means we can prepare a quality document with good disclosure that also looks good and will represent the company well. I love that ActiveDisclosure makes it easy to use more charts, colors and graphics.”



**NATHANIEL (NATE) SISITSKY**

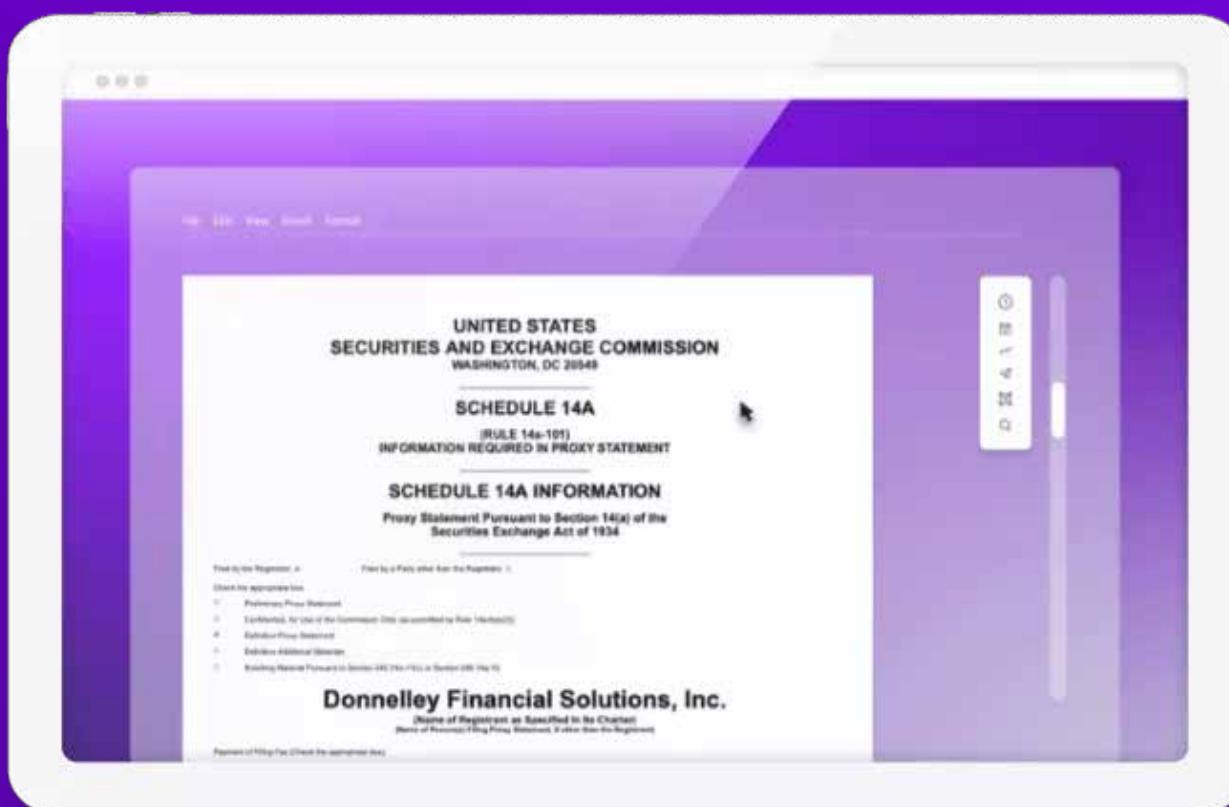
Senior VP, General Counsel and Corporate Secretary  
STAAR Surgical



ActiveDisclosure

# ActiveDisclosure streamlines proxy statement projects.

ActiveDisclosure improves proxy communications and is backed by proxy strategy and design experts. Highly intuitive collaboration tools help optimize productivity for teams of any size. Seamless integration with Excel and other data sources saves time, reduces errors and lowers costs. Unsurpassed security ensures peace of mind.



## HIGHLY STYLIZED DESIGNS

Increase visual interest and amplify your company story with brand colors, fonts, imagery, infographics and more



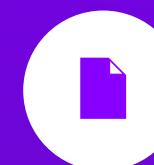
## COLLABORATIVE

Optimizes productivity with powerful collaboration features like sign-off workflows and task assignments



## EFFICIENT

Streamlines proxy statement creation and filing with features like data linking, commenting, Intelligent iXBRL tagging and more



## CONNECTED

Simple integration to your current data sources and tech stack (e.g. Excel, ERP) with outputs to various formats including PPT



## EXPERT-DRIVEN

24/7/365 support by DFIN experts dedicated to your success



## SECURE

Best-in-class, built-in security tools ensure mitigation of data and risk



# Get in touch

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