

DFIN CASE STUDY

How we help a global law firm streamline their client IPO process

DFIN
ActiveDisclosureSM

**WILSON
SONSINI**

CORPORATE SNAPSHOT

Wilson Sonsini is a global law firm ushering promising and innovative companies through their business life cycle.



**Founded
in 1961**

Started in Palo Alto, CA



**1,000+
attorneys**

In 19 offices worldwide



**3,300
clients**

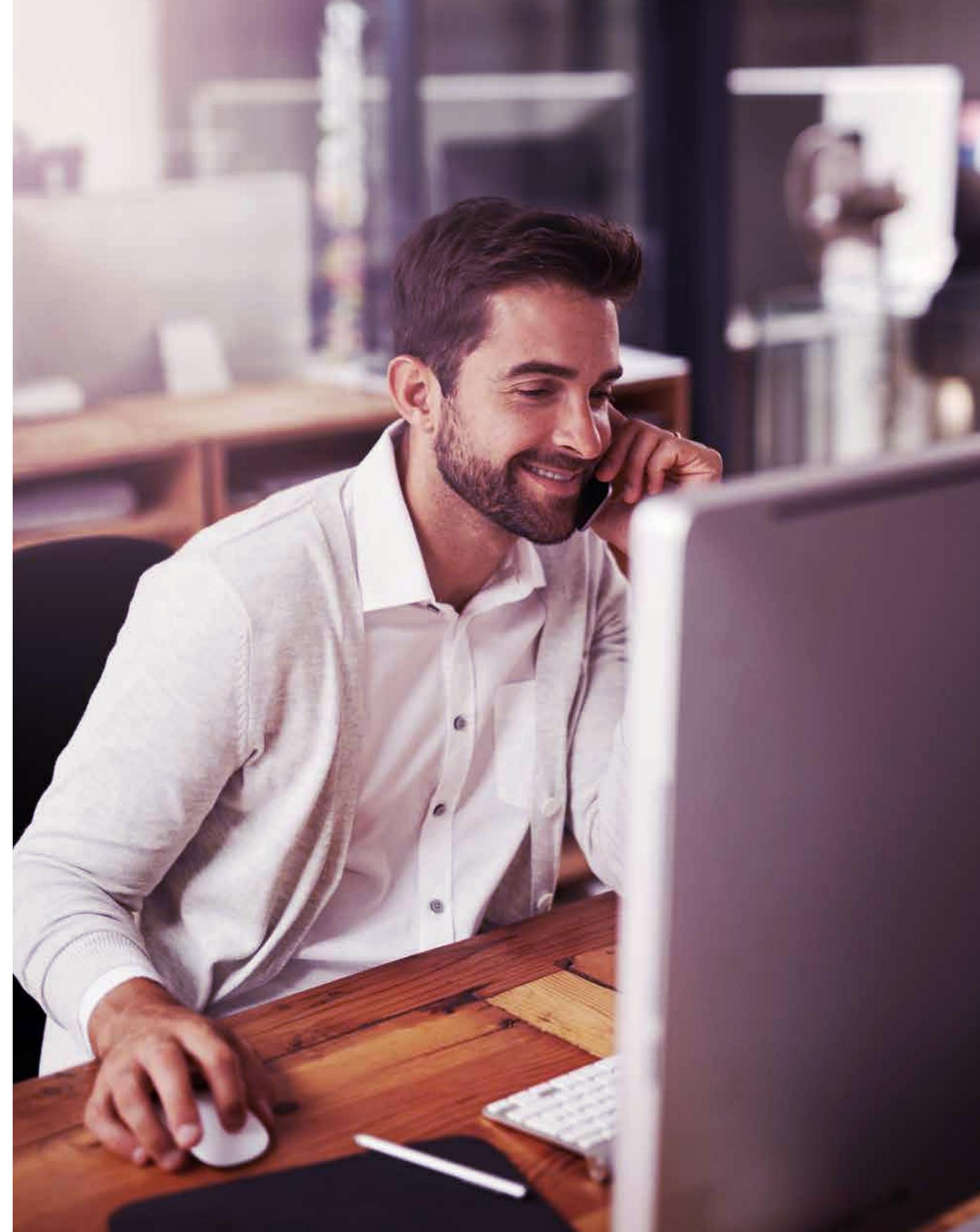
Public & private companies

Wilson Sonsini was named one of Fast Company's Top 10 Most Innovative Companies in North America for its forward-thinking approach to improving client service with technology, and its attorneys frequently explore new ways to enhance efficiencies and collaboration on IPOs and other legal matters.

CHALLENGE

Streamlining the IPO process for clients

As issuer's counsel on IPOs, Wilson Sonsini takes the lead on drafting the Form S-1 registration statement using financial and other information provided by its clients. This is inherently a time- and resource-intensive process driven by tight deadlines.



SOLUTION

Software-based solution backed by SEC filing, project management & layout experts

Wilson Sonsini leveraged DFIN's ActiveDisclosure platform to increase the operational efficiency of OneStream's IPO process.

ActiveDisclosure provides an ecosystem of digital workflows, allowing the attorneys to securely share documents for real-time reviews and comments by clients, bankers, auditors and other stakeholders using ActiveDisclosure's role-based collaboration features.

Users also leverage DFIN experts 24/7 to execute work that doesn't require strategic legal expertise, including managing projects, tracking deadlines, providing project guidance and recommendations, laying out documents and more.



INNOVATIVE COLLABORATIVE FEATURES

Make, track, compare and print change pages only on-demand



RETAIN CONTROL OF PROCESS AND DOCUMENTS

Save time drafting & editing documents and ensure accuracy focusing on high value activities while requesting DFIN for support



IN-APP COLLABORATION WITH DFIN SERVICE STAFF

Assign tasks for execution by DFIN experts 24/7

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

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

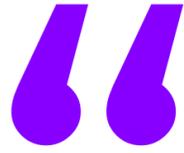
Current Assets:

Cash

Accounts receiv

Prepaid expens

Total current as



ActiveDisclosure's enhanced functionality, paired with DFIN's 24/7 premium service, provided a great client and user experience. We were thrilled to work with DFIN to support the OneStream IPO and anticipate that ActiveDisclosure will significantly boost the efficiency of IPO processes."

MICHAEL NORDTVEDT,
Co-Leader of Wilson Sonsini's Capital
Markets practice

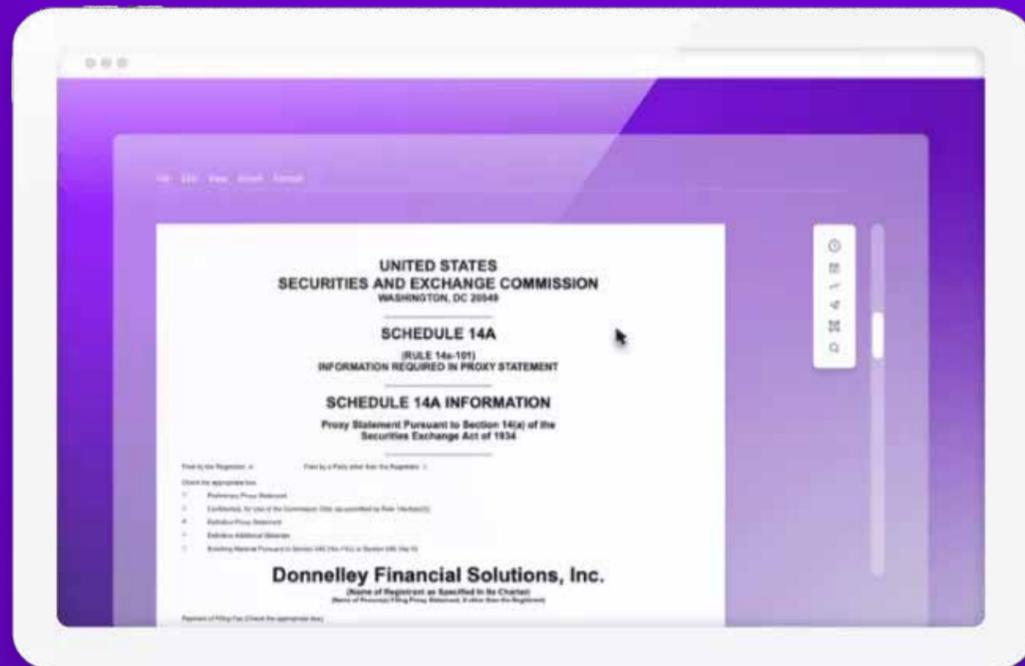
"ActiveDisclosure significantly streamlined our Form S-1 drafting process, boosted efficiency, and enabled close collaboration with our client. The collaboration capabilities and security features saved time and helped us mitigate risks at every step."

VICTOR NILSSON,
Wilson Sonsini partner



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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