



FACT SHEET | ADA TAGGING

Unlocking the Power of Accessibility: The Value of PDF Document Tagging

Undertaking PDF document tagging to enable screen readers and assistive technology, like refreshable Braille readers, represents more than regulatory compliance — it is a forward-thinking investment in the organization’s inclusivity goals, investor growth, and reputation. This proactive approach aligns with organizational values, enhances public perception, and delivers substantial financial and risk mitigation advantages.

The Importance of ADA Document Tagging

Expanding Access and Meeting Legal Requirements

The Americans with Disabilities Act (ADA) and similar global regulations, like AODA and EAA, require organizations ensure that their digital content — including websites and documents — is accessible to everyone, including people with disabilities. This means that all users must be able to perceive, understand, navigate, and interact with content, regardless of their abilities.

Document Remediation: The Missing Link

Many companies have started to get on board with website accessibility. However, they may have overlooked an important element that goes hand in hand with website accessibility: document accessibility. Fund and insurance companies, per SEC web-hosting regulations, must make important documents, like prospectuses, SAs, and annual reports, available to the public. It is important that individuals with vision, hearing, dexterity, and other disabilities can consume these documents using the best accessible and assistive options for them.

The Change From Print to eDelivery Is Forthcoming

The House has already passed the **Improving Disclosure for Investors Act of 2025**, part of the **Invest Act**. This act has bipartisan support, and when passed by the Senate,

WHY IS THIS SO CRITICAL?

- **Rising Legal Risks:** ADA lawsuits related to digital accessibility have surged in recent years, with thousands of cases filed annually.
- **Aging and Diverse Populations:** Billions of people globally live with vision impairment, and the majority are over 50 — a demographic that overlaps significantly with the investor and client base for many asset management and insurance organizations.

will change the default delivery for investors from print to eDelivery. This movement to electronic document delivery will accelerate the need for accessible documents that can be navigated and read aloud by screen readers.

Advantages of ADA PDF Document Tagging

It is highly recommended that organizations evaluate the strategic benefits of ADA PDF document tagging and prioritize the necessary actions to ensure that all regulatory landing pages and documents remain accessible and inclusive to all users. Key advantages include:

BRAND AND VALUE ALIGNMENT

Demonstrating commitment to accessibility not only fulfills regulatory requirements and improves the usability of your website, but also reinforces your organization's reputation as an ethical, purpose-driven brand dedicated to equity and social responsibility.

EXPANDING ACCESSIBILITY AND YOUR INVESTOR BASE

ADA PDF document tagging helps prevent barriers to individuals with disabilities, thus providing access and usability to products and services for a larger audience, without which, may create implications for investor relations.

ENHANCED REPUTATION

Proactively addressing accessibility requirements can substantially strengthen your organization's reputation. Stakeholders and the broader community will recognize your commitment to inclusivity and responsible business practices. This dedication fosters increased client loyalty and positive recognition, ultimately contributing to the long-term success and credibility of your brand.

ALIGN WITH INDUSTRY STANDARDS AND BEST PRACTICES

Numerous investment companies have already implemented DFIN's ADA audit and tagging protocols to adhere to industry benchmarks. By implementing ADA PDF document tagging, your organization ensures compliance with industry standards and demonstrates a proactive commitment to accessibility for all investors.

FINANCIAL BENEFITS AND RISK MANAGEMENT

In 2024, over 4,000 website accessibility lawsuits were filed in federal and state courts by individuals with visual, hearing, or other disabilities, alleging that companies' websites and mobile applications failed to comply with Title III of the ADA.¹ Implementing ADA PDF document tagging on websites allows organizations to proactively detect and resolve accessibility concerns, thereby mitigating potential risks before they escalate.

1. Source: <https://www.saul.com/insights/blog/ada-website-accessibility-risk>

FUTURE-PROOFING

As accessibility and audit standards continue to evolve, it is essential that you stay ahead of the regulations. ADA PDF document tagging will help you to future-proof, saving time and resources in the long run. By addressing accessibility issues now, you can avoid the need for costly and disruptive modifications in the future.

Role of Accessible Tagging and Common Barriers

Numerous regulatory and investor-focused documents and PDFs present barriers to accessibility, such as:

- Lack of text alternatives (alt text) for images, making graphical content inaccessible to screen readers.
- Poor color contrast, which affects users with limited vision or color blindness.
- Use of color alone to convey information, which is problematic for colorblind users and those using assistive technologies.
- Poor or illogical reading order.

Document tagging embeds metadata and structural information into PDFs and HTML-based documents, enabling assistive technologies to interpret and present content accurately, ensuring compliance with WCAG and PDF/UA accessibility standards.

DFIN's Tagging and Quality Control Process Ensures All Metadata Is Tagged Properly

Tagging does not affect the look and feel of the PDF. It enables screen readers to interpret tagged metadata to enable navigation and “read out loud” capabilities.



Reading order is correct.



Table header columns/rows and cells are tagged for read-aloud comprehension.



Primary language is set and other required PDF properties are established.



There is suitable color contrast.



Alternate text for figures and diagrams is set.



Ensure proper document navigation and all hyperlinks, including TOC items, are active.



Bookmarks are set.



Tagging is free of word concatenation and font issues.



There is a logical hierarchy of headings (H1 through H6).

Business Benefits and the DFIN Approach

Unlocking Business Value

ADA document tagging is not just about avoiding lawsuits — it’s a strategic business opportunity:

- ✓ **Broader Market Reach:** Making documents accessible removes barriers for current and potential investors, clients, and partners.
- ✓ **Positive Brand Perception:** Demonstrating a commitment to inclusion and accessibility aligns with corporate initiatives.
- ✓ **Economic Impact:** Access to a broader investor base can lead to positive economic outcomes for compliant companies, expanding the pool of potential investors.

The DFIN Tagging Process: A Simple Process That Can Be Implemented in a Few Weeks

DFIN’s accessibility process is optimized, flexible, and can be implemented quickly. DFIN does a thorough color analysis of documents in scope and works with clients to eliminate visual issues like low color contrast or use of color alone to derive meaning. Once color issues are identified and resolved, document tagging can begin. The process is quite simple:

1. Provide a PDF.
2. DFIN tags the PDF to be WCAG and PDF/UA compliant and delivers the PDF with a compliance report.

Note that if the documents reside on DFIN systems or DFIN hosts documents on your behalf, the process can be automated and streamlined, so that you always stay compliant with both SEC and DOJ web-hosting compliance rules.



INGEST

Imports your documents and content in multiple languages and formats.



ANALYZE

Evaluates all documents and reviews content for WCAG compliance. We provide advice, guidance and feedback on style and form and create a master set of guidelines.



TAG

Tags all documents and content with underlying metadata to the master set of guidelines.



VERIFY

Performs a quality assurance process including 16 independent structural and content integrity checks to ensure total compliance prior to delivery.



DELIVER

Returns fully tagged, compliant documents and content with a detailed accessibility report.

The DFIN Tagging Solution

DFIN's ADA/AODA/EAA compliance solution offers a comprehensive, turnkey approach:

- End-to-End Tagging: PDFs are tagged for screen reader compatibility, logical reading order, alt text for images, proper heading structure, tabular logic, and active hyperlinks and bookmarks.
- Quality Assurance: Each document undergoes automated and manual testing, including validation with **assistive software applications** and screen readers.
- Proof of Compliance: Every accessible PDF is delivered with a detailed accessibility report.
- Expert Guidance: DFIN provides audits, guidance on color violations, and ongoing support.

With regulatory deadlines and requirements changing, and legal risks increasing, now is the time to invest in ADA document tagging. Partnering with an experienced provider like DFIN ensures compliance and positions your organization to lead in accessibility and inclusion.

Why DFIN?

DFIN has been delivering accessibility solutions since 2018, supporting compliance with the ADA in the U.S., AODA in Canada, and the EAA in Europe. We are focused on compliance, regulatory, and marketing documents and provide expertise and guidance for color issues. DFIN has the scale, expertise, and infrastructure to meet the demands of ADA compliance.



Over 375K
Accessibility-Tagged
Pages Annually



Over 100
ADA Customers



20%
Year-Over-Year
Growth

Ultimately, when you choose to work with DFIN,
you are preparing for the future.

You're buying into something bigger than a single software solution; you're partnering with an established market leader that is forward leaning and thinking — which, in turn, will help your organization be better prepared for what is to come.

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

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