DFIN

FACT SHEET | ARCDIGITAL

ArcDigital® E-Delivery

A streamlined approach to insurance compliance materials distribution.

What is ArcDigital E-Delivery?

ArcDigital E-Delivery is a digital content delivery solution that helps insurance companies efficiently distribute regulatory and participant communications by email while supporting compliance requirements. Customizable, data-driven templates and configurable workflows help insurers deliver timely, branded communications at scale while modernizing the participant experience.

It includes email templates for a wide range of regulatory documents, including, but not limited to:

- Summary and statutory prospectuses
- Annual and semi-annual shareholder reports
- Fund fact sheets
- Supplements
- Shareholder communications

Three key benefits of E-Delivery

1

Cost Reduction

Reduce printing, postage, and fulfillment expenses by shifting eligible communications to a digital channel.

2

Modernize the Investor Experience

Deliver timely, branded, and easy-to-access compliance materials aligned with investors' digital experience.

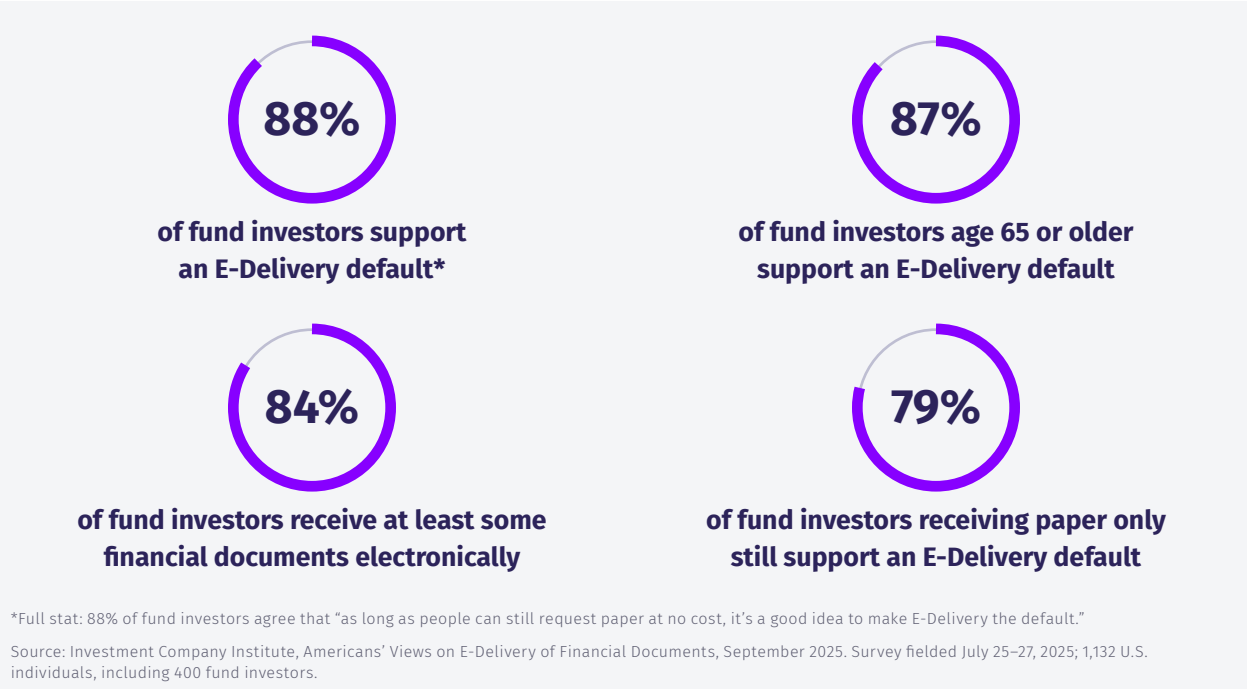
3

Streamline Workflows

Simplify campaign execution, document hosting, bounceback processing, reporting, and follow-up through coordinated workflows.

Investor preferences are already digital

Investment Company Institute research shows broad support for making E-Delivery the default when investors can still request paper at no cost.



*Full stat: 88% of fund investors agree that "as long as people can still request paper at no cost, it's a good idea to make E-Delivery the default."

Source: Investment Company Institute, Americans' Views on E-Delivery of Financial Documents, September 2025. Survey fielded July 25–27, 2025; 1,132 U.S. individuals, including 400 fund investors.

Built to simplify digital distribution

ArcDigital E-Delivery connects campaign management, document hosting, and investor and participant communications in one coordinated model.

COST REDUCTION

Compared with traditional print-and-mail fulfillment, E-Delivery eliminates reliance on printing, postage, and physical distribution, which results in significant cost savings. Customizable conversion programs can also help encourage participants to choose E-Delivery and expand savings over time.

MODERNIZE THE INVESTOR EXPERIENCE

Variable, data-driven email templates can be customized by subject line, body copy, branding elements, and sender address. Timely digital access helps organizations deliver a consistent, branded experience that meets participants where they are in the channels they prefer.

STREAMLINE WORKFLOWS

Configurable workflows can support campaign execution and reporting, bounceback processing, and subsequent print fulfillment. ArcDigital Total Compliance Management can use participant holdings to populate variable templates with links to relevant fund and participants compliance materials.

Extend the value with ArcDigital Web Hosting

Pairing E-Delivery with **ArcDigital Web Hosting** creates a more connected distribution model. DFIN can help source, update, and host newly filed compliance materials, and then provide static, predictable URLs for E-Delivery messages that direct investors to the most current applicable content.

- ✓ Reduce the burden of procuring, updating, and hosting newly filed materials.
- ✓ Support reliable access through consistent links used across E-Delivery campaigns.
- ✓ Connect document hosting, email distribution, campaign reporting, and follow-up in one coordinated workflow.
- ✓ Maintain a consistent digital experience that aligns with brand and investor-access needs.

Proposed Regulation E-Delivery

On July 16, 2026, the U.S. Securities and Exchange Commission proposed Regulation E-Delivery. If adopted, the framework would establish conditions under which covered entities could deliver covered information electronically without first obtaining affirmative consent. E-Delivery would become the default delivery mechanism for investors currently receiving paper, after notice disclosure are delivered explaining the change. It would also establish when electronic delivery satisfies delivery requirements under the federal securities laws, while preserving recipients' ability to request paper delivery.

The proposal would generally supersede the SEC's guidance-based E-Delivery approach. It also proposes changes affecting the alternative shareholder-report transmission framework, proxy materials, and tender offer materials. Regulation E-Delivery remains a proposal and is not a final rule.

STRATEGIC CONSIDERATIONS COMPANIES SHOULD BE EVALUATING TODAY

- **Electronic contact data:** Evaluate the quality and maintenance of electronic addresses used for delivery.
- **Delivery infrastructure:** Assess support for direct electronic delivery, secure access, website hosting, and high-volume campaign execution.
- **Investor preferences:** Continue capturing opt-in consent ahead of the compliance deadline while preparing to manage opt-outs, document-level preferences, and paper requests without increasing operational complexity.
- **Compliance materials management:** Connect current materials, reliable links, campaign workflows, reporting, and follow-up in one coordinated process.

A digital-first framework could create an opportunity to reduce costs and complexity while delivering a more connected investor experience.

Why partnering with an experienced E-Delivery provider matters

DFIN combines financial-services expertise, configurable technology, and managed support to help organizations reduce distribution costs, modernize the investor experience, and streamline workflows. ArcDigital E-Delivery can help teams manage digital campaigns, current document links, preference-driven workflows, reporting, and follow-up in a coordinated solution. Pair it with ArcDigital Web Hosting to further simplify the management and delivery of current compliance materials.

Part of DFIN's Arc Suite®

DFIN is the only company to offer regulatory, reporting, legal, filing, and distribution solutions through one integrated financial compliance management software platform. Arc Suite's regulatory compliance management software supports the full range of front-, middle-, and back-office operations with cloud-based proprietary tools to keep you ahead of evolving global regulatory deadlines and guidelines.

Sources and regulatory note:

Investment Company Institute, Americans' Views on E-Delivery of Financial Documents, September 2025. ICI statistics are third-party industry research and are not DFIN performance results.

U.S. Securities and Exchange Commission, Proposed Rule S7-2026-25, Electronic Delivery of Information Under the Federal Securities Laws, issued July 16, 2026, and published July 21, 2026. The proposal is not a final rule.

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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