



Corporate Disclosure

What is Corporate Disclosure?

- ◆ Corporate disclosure is information public companies, mutual funds and corporate insiders must disclose to the investing public.
- ◆ Who cares? The government! It's a legal requirement.
- ◆ Some examples of documents include:
 - ◆ 10K / Annual Reports
 - ◆ 3, 4, 5 / Insider Transactions
 - ◆ 425A / Prospectuses



What Information Can You Get From Filings?

- ◆ Industry Awareness
- ◆ Competitive Intelligence
- ◆ Strategic Decision Making
- ◆ Business Development
- ◆ IFRS Reporting / Transition
- ◆ Financial Reporting Examples / Trends
- ◆ Note Disclosure Examples
- ◆ Best Practices
- ◆ Investor Relations
- ◆ Risk Management
- ◆ Precedent Research



Which Industries Does Corporate Disclosure Affect?

- ◆ Financial Services
- ◆ Investment
- ◆ Government
- ◆ Resource Sector
- ◆ Legal
- ◆ Corporate
- ◆ Accounting



Who Benefits from Corporate Disclosure Filings?

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♦ **Marketing**

- ♦ Who: Communications Experts
- ♦ What: Press Releases
- ♦ Why: Benchmarking

♦ **Sales & Business Development**

- ♦ Who: Sales Experts & Analysts
- ♦ What: Targeted Prospect Lists
- ♦ Why: Create quick, easy, accurate and targeted lists

♦ **Investor Relations**

- ♦ Who: VPs, Analysts, Associates, Managers
- ♦ What: Mergers, Acquisitions, Financing, Press Releases
- ♦ Why: Real-time alerts and instant notification



Who Benefits from Corporate Disclosure Filings?

◆ **Corporate Actions**

- ◆ Who: VPs, Project Managers
- ◆ What: Plans of Arrangement, Take-Over Bids, Director's Circulars
- ◆ Why: Real-time alerts and instant notification

◆ **Finance**

- ◆ Who: CFOs, VPs, Controllers, Analysts, Accountants, Auditors
- ◆ What: Financial Statements / Note Disclosures
- ◆ Why: Benchmarking



Who Benefits from Corporate Disclosure Filings?

◆ Legal

- ◆ Who: Managing Partners, Associates, Paralegals, Articling Students, Librarians, Knowledge Management Teams
- ◆ What: Precedents & Alerts
- ◆ Why: Draft agreements, database of precedents and monitor prospects

◆ Client Services

- ◆ Who: Managers, Associates
- ◆ What: Reports, Contracts, Agreements
- ◆ Why: Monitor clients and track documents



Learn More

Interested in learning more about corporate disclosure? Contact us.

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