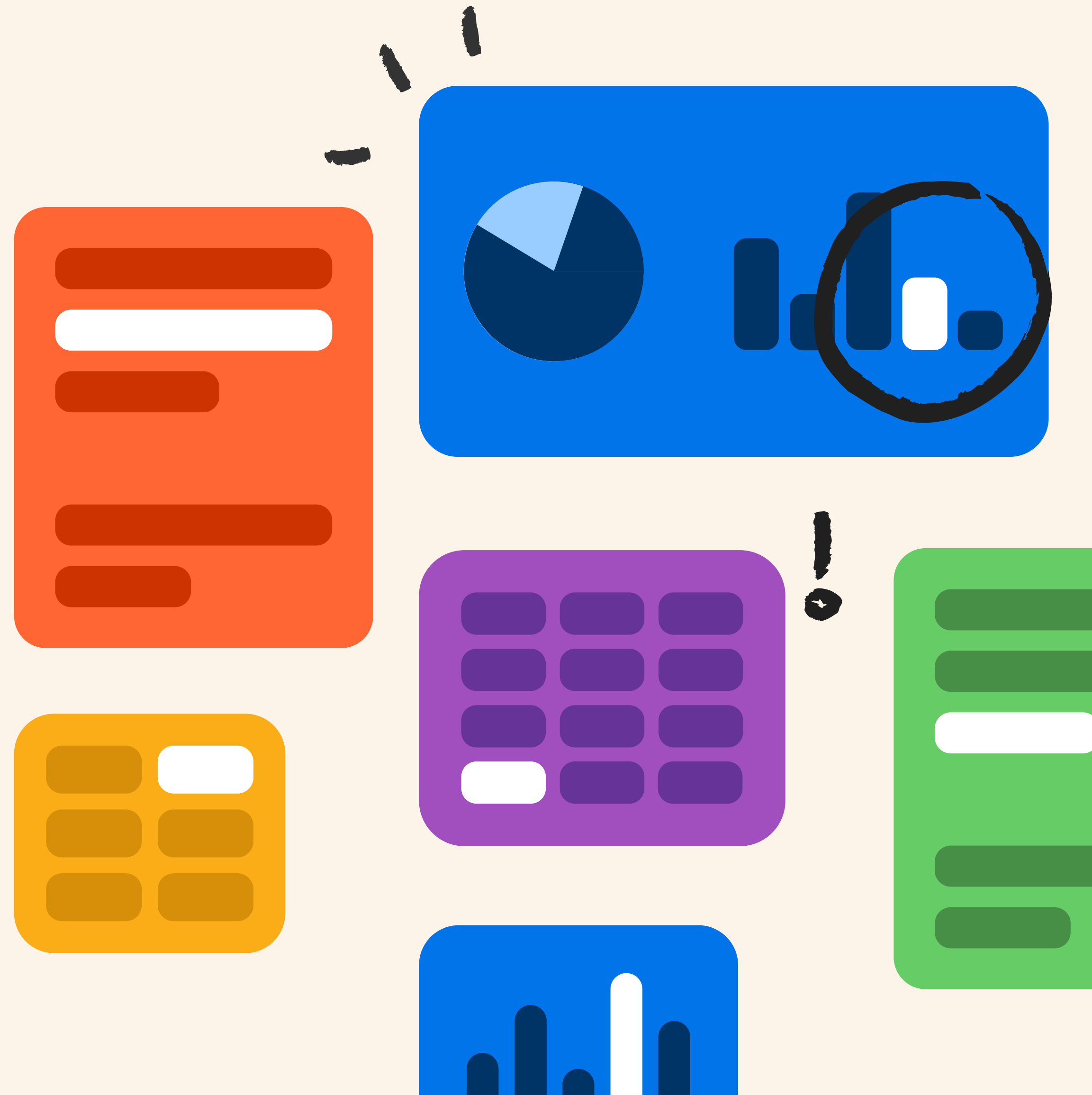


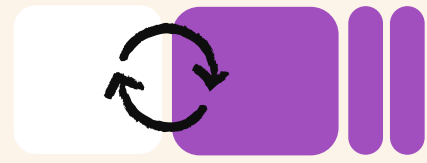
- Synopsis:
  - Workiva unites financial reporting, ESG, audit and risk in a secure, audit-ready platform. Our cloud platform ensures transparency and meets stakeholder demands for integrated reporting of financial and non-financial data. We simplify complex reporting challenges by streamlining processes, connecting data and teams, and ensuring consistency.
- Key Contacts:
  - Austin Bunning, Senior Sales Manager, [austin.bunning@workiva.com](mailto:austin.bunning@workiva.com)
  - Matt Susdorf, Sales Manager, [matthew.susdorf@workiva.com](mailto:matthew.susdorf@workiva.com)



WORKIVA PLATFORM FOR ACCOUNTING AND FINANCE TEAMS

# Automate<sup>!</sup> your financial reporting

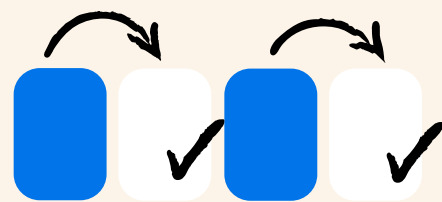




### Reporting that's automated, not complicated

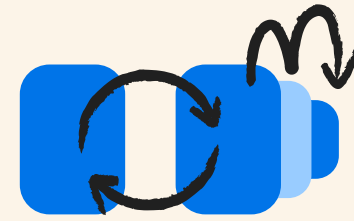
Workiva is a centralized, connected platform that scales and automates reporting processes, improves collaboration, and provides real-time visibility into project status—while minimizing the risk of human error.

Workiva's solutions modernize reporting everything from trial balance to final financial statements and SEC filings, with support for iXBRL™ tagging, ESG disclosures, monthly management reports, regulatory reporting, capital market transactions, and more.



### Simplified data gathering and preparation

Your teams can access, prepare, and manage massive amounts of data—both financial and non-financial—from multiple sources, all within the Workiva platform. Create reusable data sets to generate scheduled internal and external reporting as well as support ad hoc analysis.



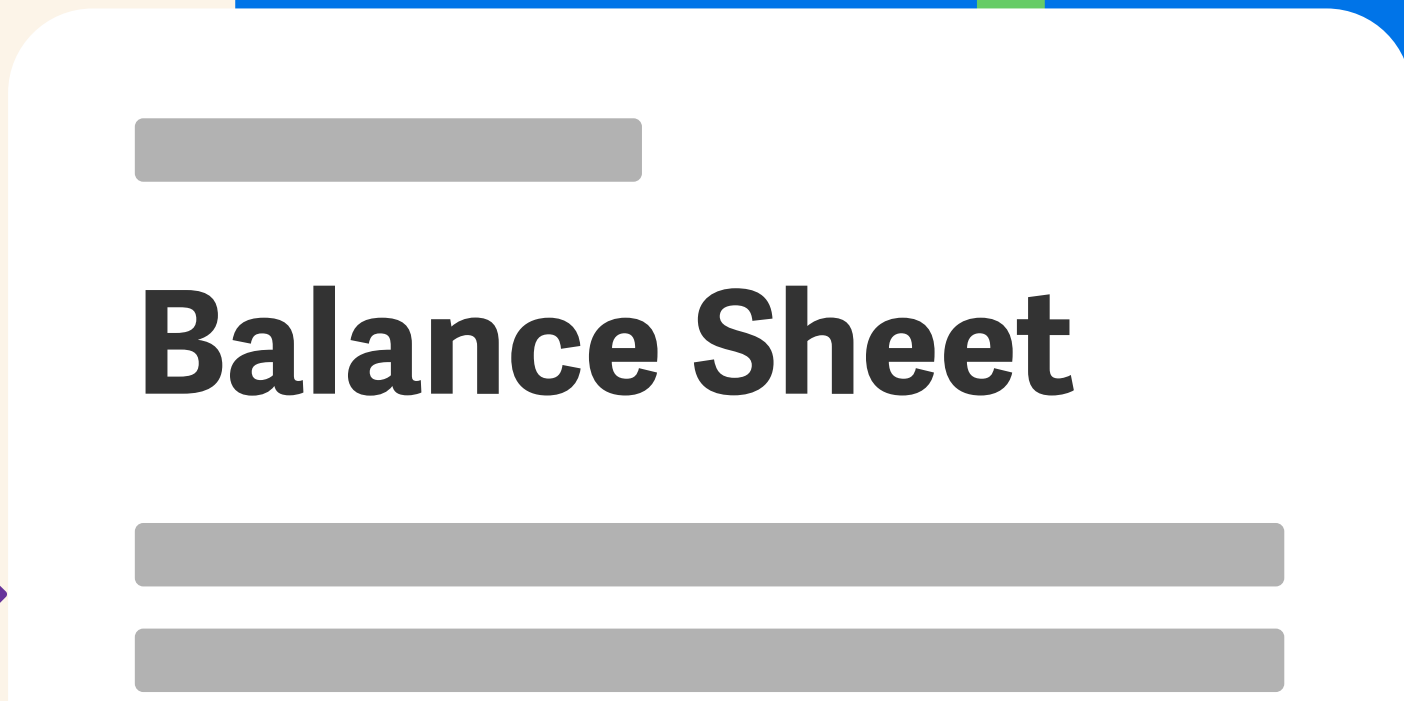
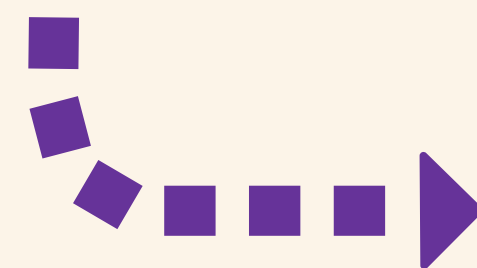
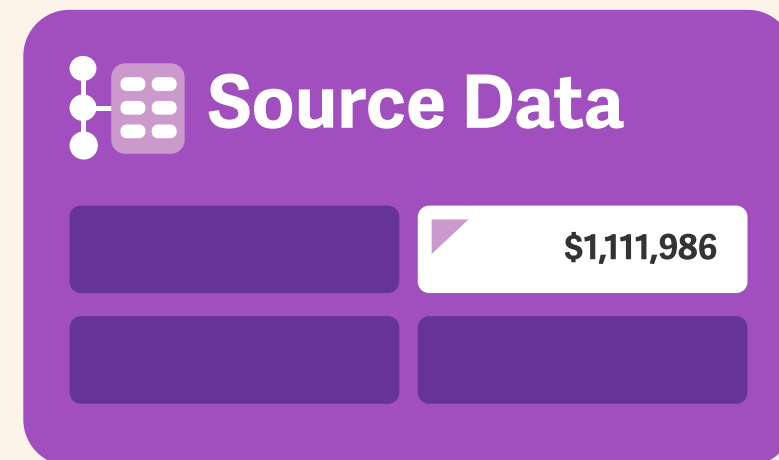
### Updates to every document at once

Link numbers and text across spreadsheets, documents, and presentations. When source data changes, all linked points update automatically. Trust your data downstream, throughout tables, footnotes, commentary and narrative, and charts and graphs.



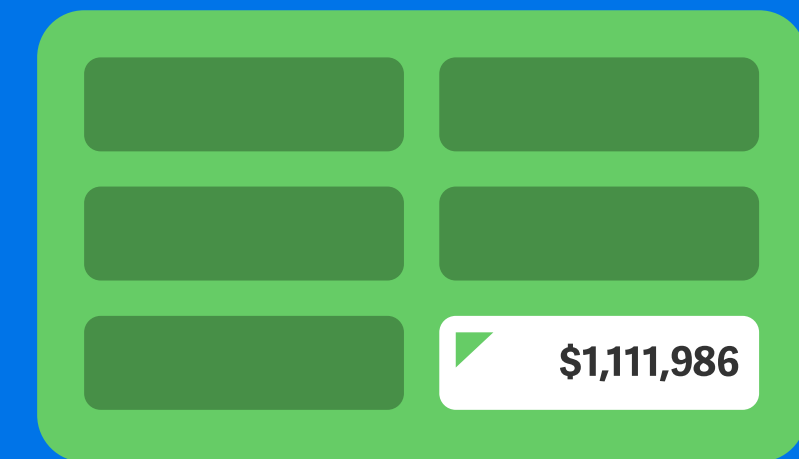
### Real-time collaboration with control

Multiple users can work on the same files at the same time. Collaborate with confidence, with the power to set user permissions down to the cell level. A full audit trail shows who changed what and when.



# Simplify the way you aggregate, prepare, and analyze your financial statements.

Take the manual work out of connecting complex data, unifying teams, and ensuring transparency and compliance, all in one easy-to-use platform.





# Automation built for accounting and finance.

## Automated processes

Make updates across documents without worrying about copy and pasting. Refresh data from source systems on schedule or on demand. Set data normalization rules for consistency across reports. By eliminating manual and repetitive tasks, your team has more time for high-value activities, such as analysis and decision-making.

## Confidence through version control

With the Workiva platform, everyone has the latest version. Eliminate checkout systems, endless email threads, and handwritten notes. Create a digital blackline in seconds to see changes from any point in time.

## Full transparency with history and audit trail

A history trail is automatically created and saved any time a change is made. Whether it's an update to a single cell or major revisions, all changes are documented—providing transparency to internal and external stakeholders.

## Always accessible

Built 100% in the cloud, the Workiva platform is accessible from anywhere with a secure internet connection. From a laptop, tablet, or mobile phone, collaborators with the right permissions have access to the information they need, wherever they are.

## Workflows that fit the way you work

Configure step-by-step workflows to reflect your own processes. Assign tasks—including data requests, approvals, reviews, and certifications—all directly within the document.



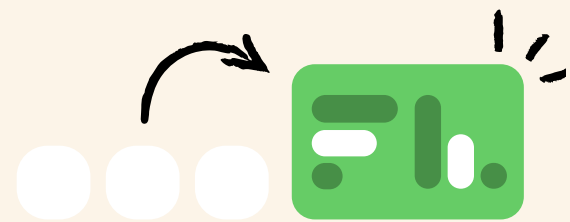
**I believe in the tool, and I believe in the functionality. Nothing is more exhausting than doing manual work, and I don't have a big team...So, selfishly, I wanted [Workiva] for me as well.**

**Jordan Brackett**  
Vice President & Controller  
Solenis



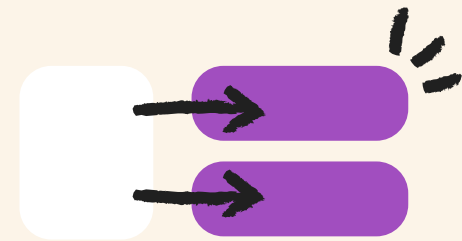


# The platform that scales with your organization.



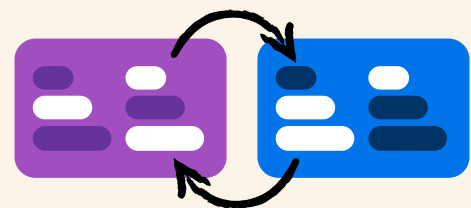
## Easy to use

Workiva solutions require little to no training. The platform powers documents, spreadsheets, presentations, dashboards, and other familiar content types, so you can get started on reporting right away.



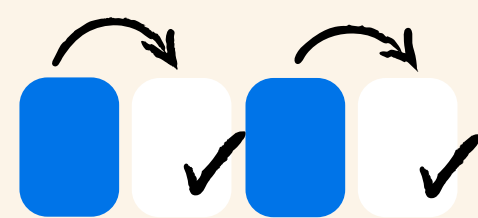
## Industry-leading and XBRL® iXBRL support

Public companies can simplify filings with Workiva. Collect, organize, and manage data automatically with built-in EDGAR and XBRL services to create, tag, validate, and file reports. If you need back up, our team also provides a wide range of support options, from full-service tagging to DIY.



## Integrations for increased flexibility

Integrations with today's top accounting technologies make it easy to bring data into the platform, from systems like SAP® solutions, Oracle®, BlackLine, Workday®, and hundreds more. Plus, find even more templates, services, and connectors on the Workiva Marketplace.



## Framework ready

With Workiva, you don't have to start from scratch. The platform is extremely framework friendly—map data according to ESG frameworks, controls to the COSO framework, IT info to SOC framework, or financial data to XBRL and GAAP taxonomies.



# Workiva solutions add a lot of value in terms of data handoffs, being efficient with our time, and then having confidence in the living version of our document.

**Joel Macholan**  
Senior Vice President, Financial Planning and Analysis  
Wintrust

# Accurate, repeatable reporting across the organization. 🎯

How accounting and finance teams use the Workiva platform:

## ✓ SEC/SEDAR Reporting

- 10-Q/10-K
- 20-F/40-F
- SEDAR Filing
- Section 16
- Proxy
- 6-K/8-K

## ✍ Internal Management Reporting

- Automated Financial Statements
- Executive (CFO, COO) Reporting
- Budget & Forecasting
- Flash & KPI Reporting
- Business Unit Reporting
- Board Reporting

## 📄 Capital Markets

- Initial Public Offerings (IPO)
- Secondary Offerings
- M&A Transactions
- De-SPAC Mergers

## 📄 Annual & Interim Financial Reporting

- Annual and Quarterly Reports
- Audited Financial Statements
- Investor Reports

## ✓ Global Statutory Reporting

- Subsidiary Financial Statements
- Statutory Adjustments
- GAAP to STAT Bridge
- XBRL and iXBRL

## 📈 ESG & Sustainability Reporting

- Financial and Non-Financial Data
- Framework Management and Compliance
- Reports, Questionnaires, and Surveys





**Several teams throughout the Hershey organization now use the Workiva platform...Being able to collaborate in one central location has simplified all of our work, allowing us to connect data, reduce risk, and automate redundant tasks.**

**Jonathan Gregory**

Director of External Reporting and  
Technical Accounting  
The Hershey Company

Simplify your  
**complex reporting**  
with Workiva.

Learn more and request  
a demo at [workiva.com](https://workiva.com)



**About Workiva**

Workiva Inc. (NYSE:WK) is on a mission to power transparent reporting for a better world. We build and deliver the world's leading regulatory, financial, and ESG reporting solutions to meet stakeholder demands for action, transparency, and disclosure of financial and non-financial data. Our cloud-based platform simplifies the most complex reporting and disclosure challenges by streamlining processes, connecting data and teams, and ensuring consistency. Learn more at [workiva.com](https://workiva.com).

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