

ComplianceOne™

Do More With One

In today's competitive environment, new product introductions and efficiency improvements are critical to achieving growth goals and meeting members' expectations. Your Member Service Representatives and Loan Officers are already responsible for many functions across your business lines, and yet you need them to do more in order to meet your changing business needs.

Your staff handles a variety of tasks such as taking applications, verifying identities, pulling credit reports, ordering checks and searching for property valuations, in addition to selecting and completing the required documents or disclosures. These tasks can be very time consuming, especially if you're using multiple systems. Introducing new products such as business lending or deposit services, or simply making changes to your existing products, adds time and complexity to your processes.

How can you improve efficiency while asking your staff to do more? The answer is simple. Do more with one solution—ComplianceOne.

The One for Your Credit Union

Making it simple

Expanding your business—as well as cross-selling and processing transactions between lines of business—is more convenient than ever with ComplianceOne. As a single comprehensive solution, ComplianceOne allows your staff to easily document deposit accounts and IRAs as well as consumer, commercial and mortgage loans—all from one system.

Inside ComplianceOne

The entire solution is infused with our Bankers Systems compliance knowledge and content, including a half-century of industry experience in lending and deposit alone. Our large in-house staff of compliance analysts constantly monitors federal and related state regulations to develop trusted documentation for all 51 jurisdictions. Moreover, we stay on top of industry developments, keep in contact with financial professionals, and listen to how you do your business.

You're in control

ComplianceOne works with a wide array of functionality that you can add to help you meet your business needs. You decide how we can

best fit your processes today and grow with you as you expand your business. As always, we'll work closely with you to help identify your specific business needs, and focus on where automation can help improve your existing processes and meet compliance requirements. And, you can feel comfortable knowing that you're backed by our industry-leading warranty.

Training and support

Wolters Kluwer Financial Services helps you get up and running quickly with onsite training and support throughout the implementation process—so your staff is ready to go when your software is.

We also provide dedicated technical support specialists to help you handle any problems that may arise in the future, and we offer toll-free compliance support for those hard-to-answer documentation questions and concerns.

See reverse side for more information.



 **Wolters Kluwer**
Financial Services



We understand your business needs, and the complex issues you face in running your business and helping your members get the products they're looking for. ComplianceOne meets these needs and more.

▶ What you need

- Process efficiency
- Branch-to-branch consistency
- Line-of-business expansion
- Field of membership expansion
- Faster new product introduction
- Member service excellence

▶ What ComplianceOne delivers

- What ComplianceOne delivers
- One consolidated solution
- Templates and autoselection
- Deposit, IRA, lending, and mortgage documents
- Compliance in all 51 jurisdictions
- Centralized policy & product control
- Transaction-specific documents & e-signatures

Process efficiency

ComplianceOne can streamline your lending and deposit workflow with its integrated origination capabilities—including the *Wiz*® family of products to help you ensure operationally aligned compliance with your reporting and analytics requirements. With ComplianceOne, you gain the ability to easily create credit applications, retrieve credit bureau reports for lending and deposit transactions, verify identity, order checks, pull automated property valuations, perform flood determinations, complete the deposit and lending documents, and more.

ComplianceOne also offers bar coding and electronic signature capabilities to support transitions to document imaging and improve existing processes.

Branch-to-branch consistency

Whether you have multiple branches or one location, you can be confident that you're providing the appropriate documents or disclosures to your members. ComplianceOne automatically selects the appropriate forms based on the specific criteria of each transaction. You also gain consistency with ComplianceOne's template feature, which allows you to build pre-filled standard transactions to minimize data entry errors and save time—improving your ability to train new employees or cross-train your existing staff.

Plus, ComplianceOne has a centralized policy control, making it easy to quickly maintain compliance and implement policy or product changes across all your branches. And, to help you further maintain compliance, the solution is updated throughout the year to implement regulatory and legislative changes at the federal and state level.

Line-of-business expansion

Regardless of the type of lending or deposit accounts you offer today or plan to offer in the future, ComplianceOne has you covered. With ComplianceOne, you can easily expand into new lines of business because ComplianceOne supports consumer and commercial deposit accounts, IRAs, and health savings accounts; as well as open and closed-end consumer, home equity, construction, commercial and mortgage loans.

Field of membership expansion

ComplianceOne contains the lending and deposit documents for all 50 states and the District of Columbia. So, regardless of where your members are, ComplianceOne can help you expand your field of membership into new jurisdictions without the worry of purchasing or developing new documents.

ComplianceOne also has the ability to integrate with our SDX Secure Document Exchange to help you quickly and securely send and receive documents and disclosures electronically with your members, no matter where they're located.

Faster new product introduction

You can respond to market conditions promptly, and quickly roll out new products (across all your branches) with ComplianceOne's centralized policy control. With ComplianceOne, you don't have to wait weeks to update your deposit or lending disclosures. You can easily update your policies and products within the administration area of ComplianceOne and roll out new products across your branches the same day.

Member service excellence

With ComplianceOne, your Member Service Representatives can efficiently open new accounts, take loan applications, and even complete loan documents within one solution. ComplianceOne reduces documentation errors and eliminates the need to manually select documents with its built-in autoselection feature—helping you serve your members more quickly and simplifying staff training by automatically selecting the required documents and disclosures for each transaction.

Along with autoselection and the integrated origination capabilities, ComplianceOne uses transaction-specific documents that are generated based on the specific attributes of each unique transaction—improving member service by helping to eliminate potential document confusion and decrease processing time.

If you make one strategic move for your future business needs, and for your Member Service Representatives, make sure it's one that helps you do more. Visit www.WoltersKluwerFS.com or call 1.800.552.9410 to learn more about ComplianceOne.



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