Document Automation

Document automation is the use of systems and workflows that assist in the creation of electronic documents.

This process is increasingly being used within the financial sector for legal & regulatory documents, fund management documents such as Key Information Documents, Factsheets and RFP.

Automation systems allow companies to *minimize data entry, reduce the time spent proofreading, and reduce the risks associated with human error.*



Market Drivers

- Increased regulations such as Packaged Retail and Insurance-based Investment Products (PRIIPs) and Markets in Financial Instruments Directive (MiFiD)
- Tighter deadlines
- Additional costs for staying compliant
- Multiple teams working on KIDs and KIIDs
- The need for efficiencies
- Accuracy is everything
- Multiple documents in many jurisdictions
- Communicate clearly with your customers
- Treating customers fairly
- Numerous documents requiring constant updating
- Financial technology



European Commission

PRIIPs KID

Build multiple KIDs in no time SRI calculator Market/Credit risk measures Reduction in yield (RIY) Full cost breakdown Performance scenarios Multiple languages

Request a sample KID

Factsheets

Original & custom documents Generation wizard Automate graphical updates Review dashboard Appealing documents Get your funds noticed Streamline production

Request a demo

UCITS KIID

Bulk production SRRI calculator Audit trial Preview your documents Multiple KIIDs Reduce time spent Multiple PDFs

Sign up for free trial

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31st December 2016 Regulation applies

PRIIPs Timeline

23rd June 2015

ESAs release Technical Discussion Paper on risk, performance scenarios and cost disclosure for KIDs

8th July 2016 autoKIID launches PRIIPs solution based on latest regulations

31st December 2019 End of transitional period

17th November 2014 ESAs release Discussion Paper

31st March 2016 Final RTS released by ESAs

on risk, performance scenarios and cost disclosure for KIDs

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for UCITS

11th November 2015 ESAs release Consultation Paper with draft RTS on: Content and presentation (Art 8) Review, revision & republication (Art 10) Timing of delivery (Art 13)

26th November 2014 Council publishes PRIIPs KID Regulation in Official Journal

30th June 2016 European Commission adopts RTS for PRIIPs KIDs

For more information, visit www.autokiid.com www.autofactsheet.com

