

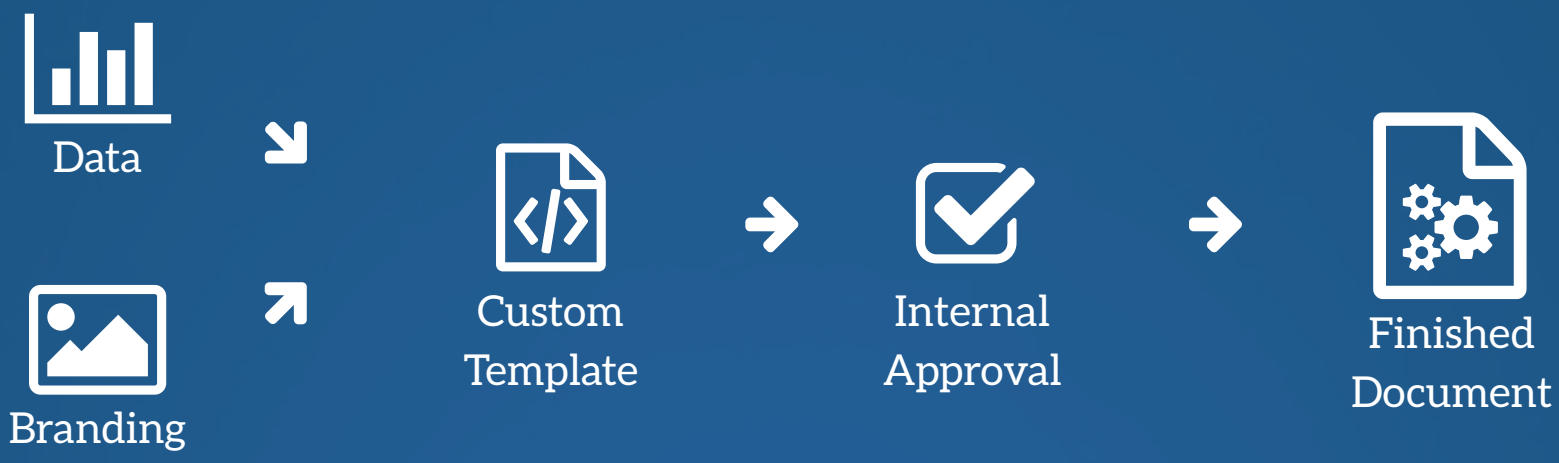


Document Automation

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



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

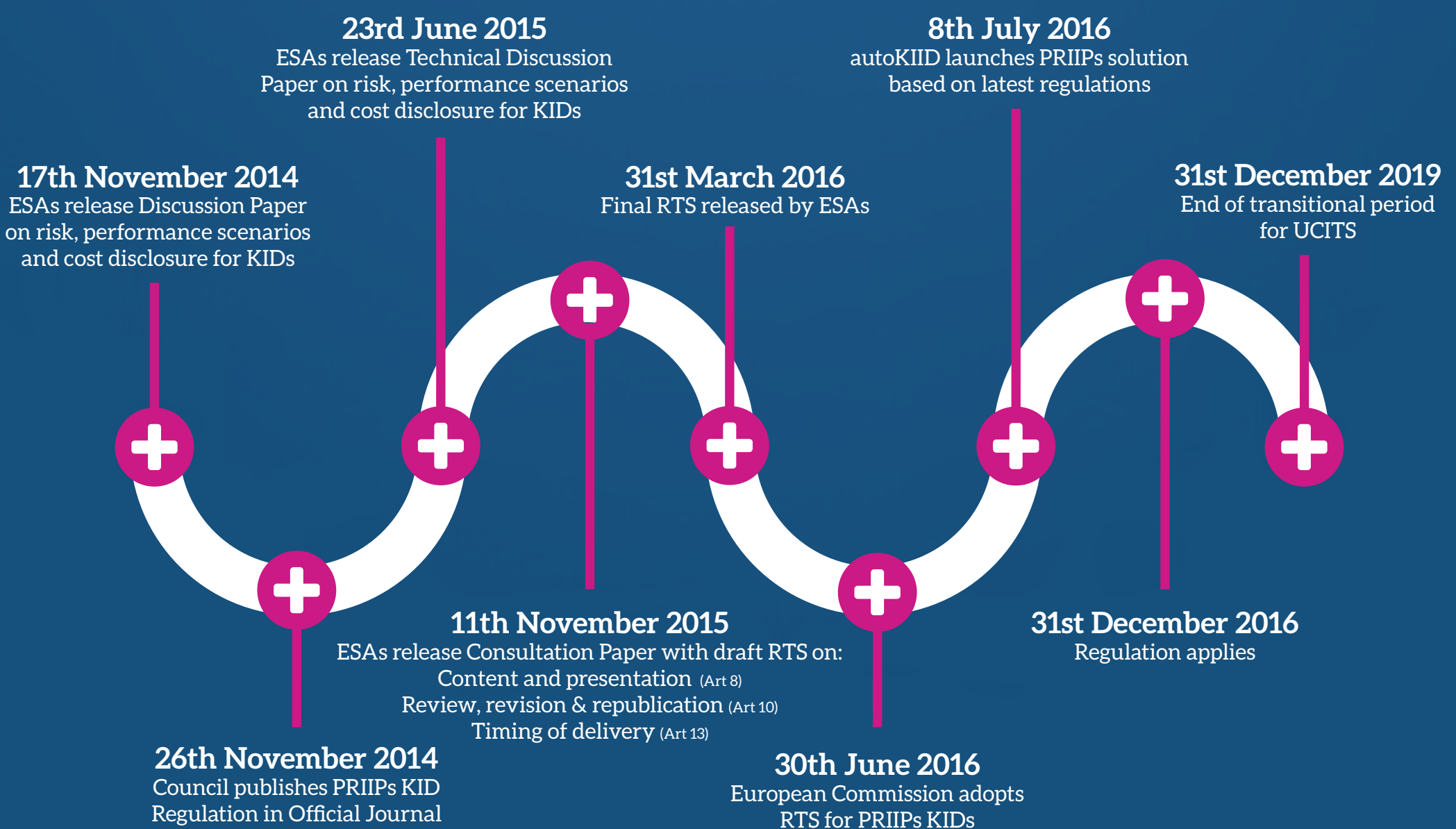
[Request a demo](#)

UCITS KIID

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

[Sign up for free trial](#)

PRIIPs Timeline



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

autoKIID.
 autoFactsheet.