



# Community Development Wiz®

Compliance made simple. Impact made real.



## Your reality

Community development compliance is critical – but often overwhelming.  
Institutions struggle with:



**Fragmented documentation** across multiple systems.



**Manual qualification processes** that consume time and increase risk.



**Exam pressure** to demonstrate impact with precision and transparency.



**Future uncertainty** as CRA rules evolve.

The result? Teams spend more time chasing paperwork than driving real community impact.

## The outcome you want

Imagine a program where:

- Every loan, investment, and service is captured in one place
- Qualification workflows are automated and consistent
- Documentation is centralized and accessible across examinations
- Reports for regulators, boards, and community stakeholders are ready in minutes
- Your institution demonstrates measurable impact – clearly and confidently



## Results that matter

With Community Development Wiz®, institutions achieve:

- ✓ **Streamlined workflows** for capturing and qualifying activities.
- ✓ **Centralized documentation** for CRA credit and optional ESG/CSR tracking.
- ✓ **Exam-ready confidence** with robust reporting and analytics.
- ✓ **Future-proof compliance** with flexibility for evolving CRA rules.
- ✓ **Optional Data Integrity Services uplift:** Data Integrity Services improve accuracy and reduce risk.



## How Community Development *Wiz* delivers

Community Development *Wiz* transforms compliance from a burden into a strategic advantage through a secure, cloud-based platform.

### Core capabilities



#### Capture and qualify

Quickly qualify loans, investments, and services using built-in impact and responsiveness factors. Pre-qualification analytics help ensure consistency and reduce risk before activities move forward.



#### Workflow and queue management

Streamline compliance with guided workflows and user-specific queues that organize tasks from start to finish — reducing complexity and improving accountability.



#### Documentation hub

Centralize CRA credit evidence in one secure location. Upload or link supporting documents and optionally track ESG/CSR activities for broader reporting needs.



#### Assessment area distribution

Assign activities to one or multiple assessment areas with precision, ensuring accurate local impact reporting and stronger CRA performance narratives.



#### Analytics and reporting

Generate examiner-ready reports and tailored summaries for boards and community stakeholders. Transaction-level detail paired with clear visuals makes compliance easy to demonstrate.

### Three community development-specific use cases

#### 1 Exam-ready documentation

Centralize all CRA credit evidence and generate reports aligned to examiner expectations.

#### 2 Assessment area intelligence

Assign activities accurately and describe impact on LMI neighborhoods, individuals, small businesses, and farms.

#### 3 Future-ready compliance

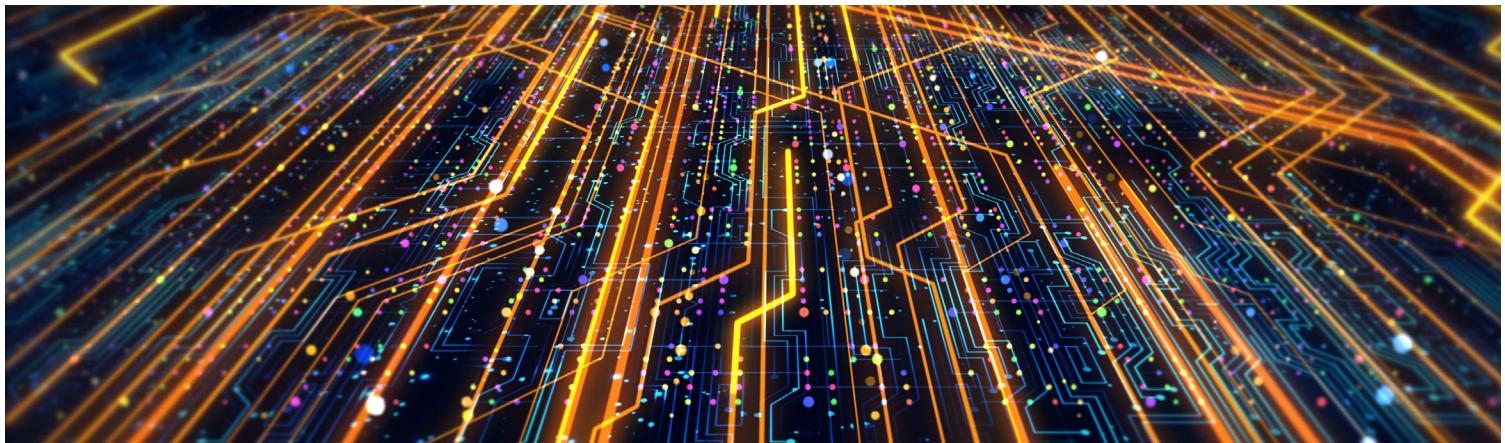
Build a foundation for CRA and ESG reporting without adding complexity.



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## Go beyond community development — unlock the *Wiz Suite* advantage

Community Development *Wiz* is part of a powerful compliance ecosystem. The *Wiz Suite* unites CRA, HMDA, Fair Lending, Community Development, and Section 1071 on one platform — so you can eliminate silos and simplify compliance.

### Why *Wiz Suite*?



#### Shared data backbone

Import, validate, and enrich data once — use it everywhere.



#### Unified dashboards

Monitor CRA performance, HMDA trends, fair lending risk, and community impact in one view.



#### Common controls

Role-based workflows and audit trails applied consistently across all modules.



#### Exam readiness by design

Every report and artifact ties back to the same validated dataset.

### Modules that work together

- **CRA *Wiz*:** Automate CRA reporting and geocoding
- **HMDA *Wiz*:** Collect, scrub, and submit HMDA data with confidence
- **Fair Lending *Wiz*:** Detect risk early with regression and matched-pair reviews
- **Small Biz *Wiz* (1071):** Prepare for new small business data requirements
- **Community Development *Wiz*:** Centralize and qualify community development activities

### Bottom line:

With *Wiz Suite*, compliance becomes connected, efficient, and strategic — helping you reduce risk, save time, and demonstrate impact.

## US Regulatory Consulting and data integrity (optional add-ons)



**US Regulatory Consulting**  
Strategic guidance, exam preparation, and staff training to strengthen CRA programs.



**Data Integrity Services**  
AI-powered and expert-reviewed validation to reduce errors and improve submission quality.



**See Community Development *Wiz* in action.**

To find out more, please visit [wolterskluwer.com](http://wolterskluwer.com) or contact us at 800-261-3111

[Explore Community Development \*Wiz\* →](#)

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