Wolters Kluwer® CompliEditor Suite

FAQ for Financial Institutions

1 What is CompliEditor?

Wolters Kluwer® CompliEditor Suite (CompliEditor) is a **self-service disclosure generation tool**. It enables financial institutions to create, tailor, and update compliant disclosures **in real time**, without waiting on vendors or relying on manual processes.

2 Who is CompliEditor designed for?

CompliEditor is built for **all financial institutions**, especially those facing frequent regulatory updates, limited drafting resources, or long turnaround times for content changes.

3 What problems does CompliEditor solve?

Institutions often struggle with:

- Update cycles that take **6-8 weeks**
- Manual, error-prone workflows
- Inconsistent disclosures across their account opening channels
- Slow adoption of regulatory changes
- Limited resources to draft compliant content that is clear and concise

CompliEditor turns these bottlenecks into a **real-time, self-service workflow**.

4 How does CompliEditor improve compliance agility?

The tool allows teams to:

- Adopt regulatory changes **early**
- Implement updates **immediately**
- Reduce compliance risk through consistent, accurate disclosures

Because changes no longer depend on vendor queues or manual processes, institutions respond faster when regulations shift.

❺ Does CompliEditor still use Wolters Kluwer's warranted content?

Yes. Institutions continue to benefit from **trusted, warranted language** from Wolters Kluwer's compliance experts, with the added ability to tailor and deploy it themselves and on their own timeline.

❻ What can institutions customize with CompliEditor?

CompliEditor supports institution specific customization, including:

- Policies and operational procedures
- Tone and clarity
- Branding and preferred terminology
- Institution specific options (e.g., features, fees, workflows)

This allows customer facing content to be clearer, more tailored, and more consistent.

❼ How does CompliEditor support multichannel delivery?

The tool ensures disclosure content is **consistent across delivery channels**, reducing the risk of mismatched or outdated information reaching account holders. At launch we will be supporting PDF, SFX, and WMF.

❽ How fast is "real-time generation"?

CompliEditor reduces update cycles from **weeks to minutes**.

Institutions can immediately:

- Edit text
- Integrate required changes
- Print previews
- Generate updated disclosures for use in production

❾ What are the key capabilities of CompliEditor?

CompliEditor provides:

- Real-time disclosure generation
- Tailored compliance language
- Improved readability and clarity
- Regulatory agility
- Faster reaction times
- Consistency across channels
- Explanations of regulatory changes

⑩ What business value does CompliEditor deliver?

Institutions benefit from:

- Reduced operational burden
- Faster customer facing updates
- Lower reliance on third-party vendors
- Improved account holder experience
- Lower compliance risk

⑪ Will CompliEditor require new staff or technical expertise?

No. The tool is designed to be **intuitive, self-service**, and accessible for compliance, operations, and product teams without specialized technical skills.

⑫ Why should existing Wolters Kluwer customers upgrade to CompliEditor?

Because customers already use Wolters Kluwer content. CompliEditor simply adds:

- **Speed**
- **Control**
- **Real-time execution**
- **Self-service customization**

It turns your existing content into a **modern, agile, production-ready disclosure engine**.

⑬ Can CompliEditor help convert our existing disclosures into the system?

Yes. You can choose to have our Editorial team reverse-engineer your current disclosures and rebuild them within CompliEditor. This is an optional, paid service.

⑭ What does the onboarding process for CompliEditor Suite look like?

Your onboarding will be guided by our Professional Services (Pro Serv) team. They'll schedule a series of short, focused sessions to walk you through:

- Setting up your financial institution
- Building your policies and disclosures
- Configuring your product offerings

The full process typically takes about **5–6 hours**, broken into manageable pieces.

15 What ongoing support is available after onboarding?

Each year, you'll receive **5 hours of Pro Serv support**. You can use these hours for:

- Training new team members
- Getting help or guidance on updating your disclosures
- Adding new products
- Other configuration support you may need

16 How do we get started?

Your Wolters Kluwer team can provide:

- A live demo
- A walkthrough of your current disclosure workflows
- A comparison of today's turnaround times vs. real-time generation