

CRA Wiz[®]

Compliance made simple. Community impact made visible.

Your reality

Community Reinvestment Act (CRA) compliance is more than a regulatory requirement — it's a reflection of your institution's commitment to the communities you serve. But meeting those obligations is complex:



Disparate data sources and manual processes slow you down.



Assessment areas shift with market dynamics, requiring constant updates.



Examiners expect precision and transparency across multiple years of performance.

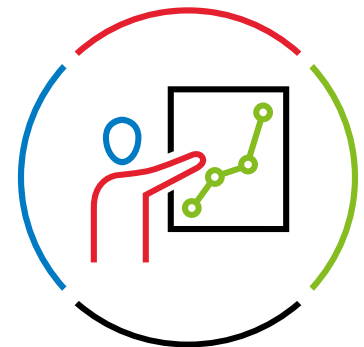
The result? Teams spend more time fixing files and less time focusing on strategy and outreach.

The outcome you want

Imagine CRA compliance that feels effortless:

- Data flows in cleanly and is validated automatically
- Assessment areas and maps update without guesswork
- Exam tables and narratives are ready well before deadlines
- Your institution demonstrates community impact with confidence and clarity

Instead of scrambling for compliance, you're using insights to strengthen performance and deepen community relationships.



Results that matter

With CRA Wiz[®], institutions achieve:

- ✓ **Faster workflows** with cloud-based automation — no IT burden, no manual bottlenecks.
- ✓ **Cleaner data** through built-in edit checks and guided scrubbing.
- ✓ **Exam-ready confidence** with CRA tables, mapping, and documentation aligned to examiner expectations.
- ✓ **Strategic visibility** via dashboards and peer benchmarks that turn compliance data into actionable insights.
- ✓ **Optional Data Integrity Services uplift:** Expert and AI-assisted validation improves submission quality by **up to 25 percent**, reducing recurring errors and audit risk.

How CRA *Wiz* delivers

CRA *Wiz* transforms compliance from a burden into a strategic advantage through a connected, cloud-based platform.

The foundation



Data intake and validation

Import loan and activity data from LOS, core systems, or spreadsheets. Built-in edit checks and guided workflows make clean data the default.



Enrichment and geocoding

Nationwide, compliance-grade geocoding enriched with census and peer context for accurate analysis and reporting.



Analytics and dashboards

Compare performance, identify gaps, and track trends with dashboards that bring CRA signals into focus — alongside peer and market context.



Reporting and audit trail

Generate CRA tables, create exam-aligned views, and maintain full traceability from source data to submission artifacts.

Core capabilities



Import and update data

Handle multiple file types, append or update records, and expand fields for deeper analysis.



Record editing and review

Single or batch updates with visual prompts and powerful filters for targeted clean-up.



Regulatory reporting

Standard CRA tables plus custom reports for exams and internal reviews.



Geo-mapping and visualization

Build assessment-area maps, perform spatial analysis, and plot lending, deposits, community development activities, branches, and ATMs.



Performance benchmarking

Compare your institution's performance against industry aggregates for context-rich insights.

Connected by design

- **CRA + HMDA**
Manage both in one platform for streamlined workflows.
- **CRA + Community Development *Wiz***
Integrate lending, investments, and services for a unified view of CRA performance.
- **Governance you can trust**
Role-based workflows, approvals, and audit trails ensure consistent controls across modules.

Three CRA-specific use cases

- 1 **Pre-exam peace of mind**
Clean and geocode records, generate CRA tables, and review peer comparisons in advance — so exam discussions focus on outcomes, not data fixes.
- 2 **Assessment area redesign without guesswork**
Use mapping and demographic variables to refine assessment areas and document the rationale — then compare lending and deposit footprints against market context.
- 3 **Community development story, substantiated**
Centralize community development activities, attach qualifiers and documentation, and roll them into exam-aligned views that demonstrate tangible community impact.



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Unlock the *Wiz* Suite advantage

CRA *Wiz* is just one piece of a connected compliance ecosystem. The *Wiz Suite* brings CRA, HMDA, Fair Lending, Community Development, and Section 1071 together on a single platform — so you can streamline workflows and eliminate silos.

Why *Wiz* Suite?



Shared data backbone

Import, validate, and enrich data once — use it across all compliance activities.



Unified dashboards

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



Common controls

Role-based workflows and audit trails applied consistently across every module.



Exam readiness by design

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

Modules that work together

- **CRA *Wiz***: Automate CRA reporting, geocoding, and exam table creation.
- **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

Strategy workshops, mock exams, gap analyses, program design, and training tailored to CRA (and HMDA/ Fair Lending/1071 when relevant).



Data Integrity Services

AI-assisted validation plus expert review to flag anomalies, fix inconsistencies, and improve submission quality — often by up to 25 percent.



See CRA *Wiz* in action.

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

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