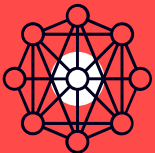


DocAuto

Manufacturers of structured products are required to produce thousands of legal and investor-facing documents, including term sheets and marketing materials. Automated documentation workflows optimize the document generation process, which saves time, reduces error rates, and cuts costs. We offer a range of solutions, including self-service and fully sourced templating options.

Our solution

- Two service models: (1) self-service templating and (2) fully outsourced template creation and maintenance by dedicated staff, subject to contractual SLAs
- Data entry options via REST API (for flow trades) or a web-based form (for bespoke structures)
- Document generation in DOCX and PDF formats
- Multiple integration options: (1) standard PRIIP Cloud XML format, (2) IBT format or (3) custom client-side XML/JSON formats
- Multi-language drafting engine
- Integrated market data
- Common code libraries with modular design, which allow onboarding of new payoffs very quickly
- Daily regression testing at the UAT/PROD boundary and, optionally, in PROD for zero-error code releases
- Workflow tool to coordinate multi-party document review and sign-offs
- Integrated SEC EDGAR filing capabilities
- Minimal vendor dependence as all document templates and related code may be exported into a standalone webapp
- Integration with Luma and Transparitrade multi-issuer platforms



Step 1: Data

You provide the product data to us automatically via REST API (for flow trades) or manually via a web UI (for bespoke trades). We validate the data and enrich it with market prices.



Step 2: Template

The data is merged with document templates for term sheet, final terms, and other required documents. The document generation engine uses state-of-the-art code libraries to draft all relevant disclosure, including translations (if applicable).



Step 3: Document

Documents are generated within seconds. Thanks to our solution's distributed architecture and load balancers, we can handle peak loads of ten or more documents per second.



Step 4: Review

If required, the documents are then forwarded to our Workflow tool for central tracking of review, comments and sign-off of documents, which can include the dissemination of the documents and related metadata via RegXchange and/or filing with regulators.

Benefits

Time savings

- Establish a robust STP issuance process
- Serve RFQ platforms with term sheets created in real time

Higher accuracy

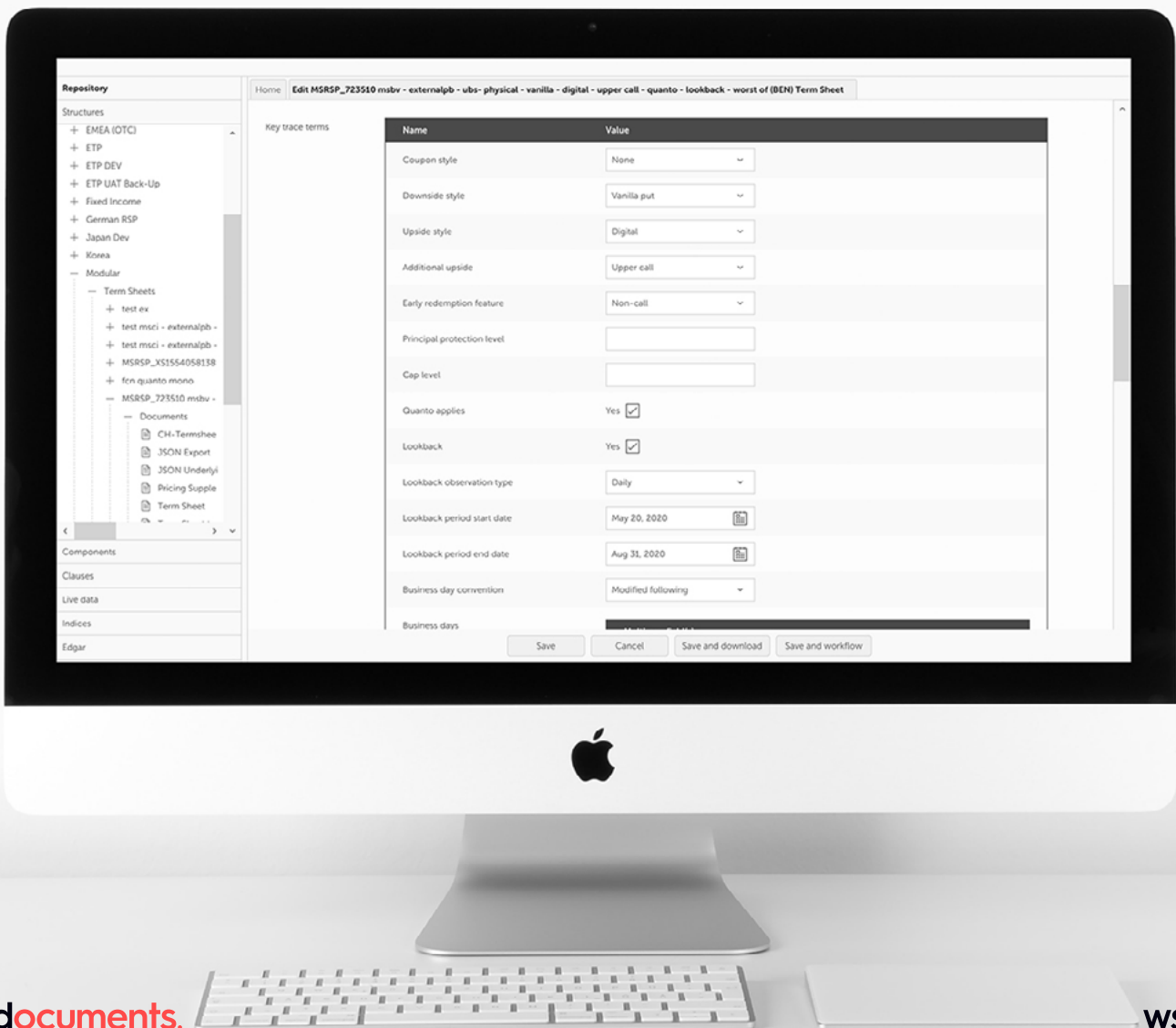
- Increase client satisfaction
- Reduce compliance risks

Lower legal spend

- Cut back involvement of lawyers in drafting of deal documents
- Convert variable cost legal opinions into a flat-fee service regardless of trade volumes

Headcount optimizations

- Allow staff to focus on revenue-generating activities
- Convert employee headcount into a metered fully managed service



Tel +44 (0) 203 865 1787
Email info@wsd.tech
Web www.wsd.tech

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