

## Financial Services

# CASH Suite™ & Medici® Integration

Streamline & accelerate  
commercial loan  
document preparation

Combine the commercial loan origination and servicing capabilities of CASH Suite™ with the commercial loan documents prepared in Medici® for a comprehensive solution that increases accuracy and reduces operational risk across the commercial lending process.

In order to achieve and maintain growth while remaining profitable and compliant, credit unions and banks need a solution that enables the efficient management of commercial lending tasks from beginning to end.

CASH Suite is a commercial lending software solution that helps increase profits and grow top line revenue by achieving straight-through-processing across every step of the commercial loan lifecycle. CASH Suite helps lenders manage business development, financial analysis, risk management and pricing, credit communications and approvals, covenant compliance tracking, portfolio management, stress testing and in depth reporting.

Medici Commercial Lending Documentation System is a database-driven software system that dynamically generates commercial loan documents. Medici centralizes commercial lending administration, expedites the loan process, and offers an industry leading compliance warranty on professionally drafted commercial loan documents to minimize risk.

### Eliminate redundant data entry and achieve greater efficiency.

- Leverage single point of data entry
- Minimize data entry errors
- Decrease processing time
- Reduce resource requirements
- Mitigate operational risk
- Enhance profitability

Together, CASH Suite and Medici provide an integrated solution that drives increased efficiencies and greater accuracy while reducing operational risk and enhancing profitability throughout the entire commercial loan process.

# Accelerate Your Loan Document Preparation in 3 Simple Steps

1. Within CASH Suite, identify loan requiring loan document preparation.
2. Submit loan from CASH Suite to Medici.
3. Using Medici, retrieve imported loan and proceed with document preparation.

## CASH Suite™

*The following data is sent from CASH Suite to Medici*

- Account number
- Loan amount
- Rate type
- Interest rate
- Rate change frequency
- Floor rate
- Ceiling rate
- Payment frequency
- Product term
- Amortization period
- Estimated close date
- Contact specific fields
- Company specific fields
- Collateral information
- Real estate specific fields
- Vehicle specific fields

## Medici®

*The following documents are then generated from Medici*

- Closing agenda
- Loan data sheet
- Loan agreements
- Promissory notes
- Mortgages and deeds of trust
- Security and control agreements
- Asset based lending documents
- Agricultural lending documents
- Disbursement authorization

CASH Suite and Medici are backed by the unique combination of industry knowledge, technology and responsive customer support provided by Wolters Kluwer. For more information on

how CASH Suite and Medici can help you strengthen your commercial lending portfolio and accelerate your success call **888.765.4939** or visit [WoltersKluwerFS.com/CASH](http://WoltersKluwerFS.com/CASH).

### About Wolters Kluwer

Wolters Kluwer N.V. (AEX: WKL) is a global leader in information services and solutions for professionals in the health, tax and accounting, risk and compliance, finance and legal sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with specialized technology and services.

Wolters Kluwer reported 2015 annual revenues of €4.2 billion. The company, headquartered in Alphen aan den Rijn, the Netherlands, serves customers in over 180 countries, maintains operations in over 40 countries and employs 19,000 people worldwide.

Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt program. The ADRs are traded on the over-the-counter market in the U.S. (WTKWY).

For more information about our solutions and organization, visit [WoltersKluwer.com](http://WoltersKluwer.com), or for our financial services solutions, visit [WoltersKluwerFS.com](http://WoltersKluwerFS.com).

© 2016 Wolters Kluwer Financial Services, Inc. All Rights Reserved.

CS-16-4642 CASH Suite & Medici Integration Product Sheet