

EquityEQ Compliance Use Case

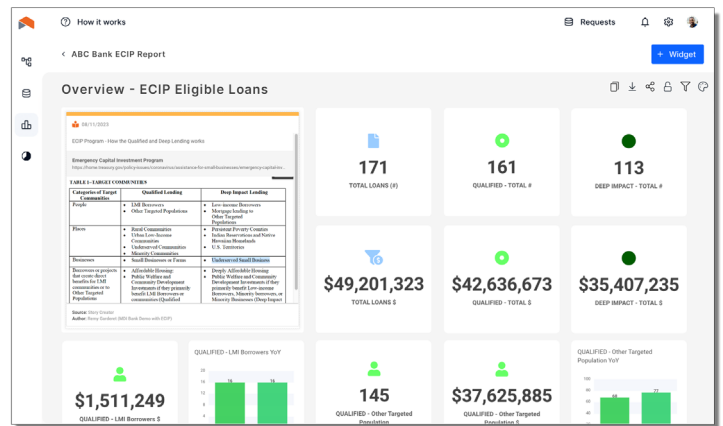
Are you struggling with compliance reporting and seeking an efficient solution?

Look no further than EquityEQ. This innovative platform streamlines the transformation of your lending and deposit data into a centralized hub, saving you time and resources. Say goodbye to labor-intensive processes and embrace a more effective way to manage compliance reporting while crafting a compelling impact story.

Welcome to Your New Data Hub

For many community lenders, the current data landscape is cumbersome and fragmented. EquityEQ emerges as a centralized hub, simplifying data management across your organization. With EquityEQ, you can:

- Consolidate all uploaded loan transaction data into an easily accessible online platform.
- Create customized dashboards effortlessly, adjusting data visibility, user permissions, and external sharing preferences.
- Seamlessly integrate new data fields into existing dashboards.
- Effortlessly filter dashboards to focus on specific programs, loan types, time periods, or geographies served.
- Set and track goals, benchmark performance, and embed or share dashboards for enhanced accessibility.
- Export data in various formats, including PDFs and CSV files.



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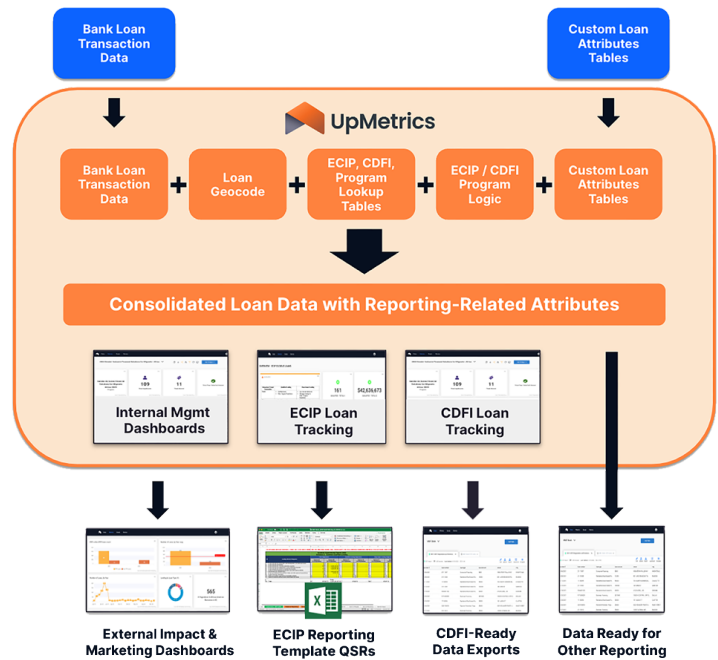
Say Goodbye to Excel Calculations

EquityEQ takes the pain out of data retrieval and organization. No more manual geo-coding or complex Excel formulas. The platform automates geo-coding, links data to relevant lookup tables, and incorporates program logic for compliance calculations. **Review, certify, and export reports effortlessly, saving valuable time and resources.**

Turn Your Compliance Reports into an Impact Story

Move beyond traditional compliance reporting. Use EquityEQ to shape your institution's narrative on social impact. Leverage the dashboard to:

- Automatically calculate impactful statistics based on your loan data.
- Generate compelling charts, maps, and visualizations showcasing your lending activity.
- Highlight positive trends over multiple years, creating a powerful narrative.



Pricing

EquityEQ aims to be accessible and equitable. Costs are adjustable based on the asset size of your institution, loan fund, or investment portfolio. The standard subscription length is 2 years, with discounts available for longer terms. To experience a demo of EquityEQ or learn more about subscription options, contact Anthony Barr at abarr@nationalbankers.org. Transform your compliance reporting into a strategic advantage with EquityEQ.