

WallStreetdocs At A Glance

Reinventing Deal Execution and Compliance

Overview

WallStreetdocs is an innovative provider of document-centric automation solutions for banks and other financial institutions. We offer a complete range of tools for creating, processing and storing legal and financial documents. We also offer a library of standard forms and a database of boilerplate disclosure. Depending on your requirements, you can opt to license our entire range of solutions or individual components.

Together with our extensive experience in legal drafting techniques and our familiarity with a broad range of legal documents and our unique approach to customer service, we help our clients create better and more consistent documents in less time and at a substantially reduced cost.

Our goal is to ensure that a client's investment in document automation is not only successful but long-term. Accordingly, we take pride in offering our clients not only a superior document automation solution but the services of professional support lawyers who understand legal and financial documents and are capable of quickly and efficiently turning them into templates. We work closely with our clients to ensure document templates are kept up to date.

Key Features

Flexible and intuitive web-based user interface to get you started quickly

- Data entry modeled on the layout of real-world term sheets
- Sophisticated web-based editor that allows you to create new term sheets from scratch in minutes.
- No need to install new software

Dictionaries provide convenient access to shared reference data

- Store reference data in one convenient place that is accessible from any document
- Changes are immediately reflected in all generated documents
- Pre-built dictionaries allow access to boilerplate disclosure (*e.g.*, underlyings, interest rates, counterparties, selling restrictions, standard legal clauses)

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Powerful templating engine that can handle even the most complex documentation challenges

- Feature-rich templating language, based on PHP, the world's most popular scripting language, with full business logic support
- Built-in customizable function library to allow the same business logic to appear in multiple documents
- Microsoft Word add-in allows for drag-and-drop authoring of templates

Centralized template and data management so that you never have to type the same text twice

- Generate multiple documents from the same set of data
- Integrate data from multiple external sources
- Reusable structure components to enable shared business logic
- Clauses to allow you to reuse the same text block in multiple documents

Full auditing and security to ensure compliance and accountability

- Auditing ensures a recorded, transparent trail of transaction structures and deals
- Full access control that can be as granular as needed

Support from our document automation legal team with years of experience in finance

- Experience with financial documents allows our legal team to handle a large range of automation requests
- Process consulting available to overcome traditional adoption obstacles
- Templates can be handled by our team so that you can realize the benefits of automation immediately.

Full API for document generation and data import/export

- Easy-to-use REST API
- XML and JSON support