

A photograph of two women in a professional setting, possibly a meeting or office. One woman is in profile, looking towards the other woman who is facing her. They appear to be engaged in a conversation. The background is blurred, suggesting an office environment.

# CDTRAX

Manage ALL Community Development Activities: Services, Investments, Community Development Loans and Donations.

## ASSEMBLY

- Through a secure, multi-user solution
  - Enter - real time
  - Save - real time
- Qualifying CD Activities. Effective reporting and analysis depends on having data you can trust.
- Data, Reports & Onboarding
  - Data entry capability
  - Export reports to Excel
  - List styles, note fields, expanded or abbreviated
- Security Management
  - Individual Security Restriction Controls
  - Concurrent Multi-User
  - Network Capability

## ANALYSIS

- Each CRA Exam has two or three parts, depending on your bank's size and standing: Lending, Service and Investment tests; or Lending and Community Development. How do you easily collect and report it all?
  - Segment / Sort
  - Report
  - Analyze
- CDTrax is complete with advanced segmentation tools, and easy-to-establish filters on the fly. Easily select investment or service types, branches, impact areas or non-profits you're working with.

## ACTION

- Communicate performance. Collect, qualify and report internally and to examiners both your Service and Investment activity overall, and by each of your Assessment Areas. Breakout results:
  - Affordable Housing
  - Community Services
  - Economic Development
  - Revitalization of Low and Moderate Income Areas/Geographies
- **All banks, regardless of size** must make this information available to the examiners during their CRA exam.