Compliance file — wording, charges and log

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

Document issued on 09/11/2026

Built as you go · fictional document

Fictional document — demonstration example

This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

Fictional document, produced for the demonstration. **The wording is taken from the template the firm's compliance officer maintains** — the agent applies it, it creates none.

What the file contains

Item	Content	Origin
Wording block	**Applied to every document in the version in force on the date of dispatch**	**The firm's template**
Charges displayed	By wrapper and by nature	Partner statements
Dispatch log	Which document, to which client, on which date, signed by whom	System log
Template version log	**What changed, when, and which documents the version applies to**	**Template history**

The time this shifts

Item	Before	After	Over the year
Carrying over the regulatory wording	**30 % of the time of a report — 28 min 30 s**	**4 % — 3 min 50 s**	**1,548 hours across 3,760 reports**
Preparing the annual review	**3 weeks**	**Half a day of reading**	—

The point a review looks at first

Measure	Previous year	This quarter
Documents carrying a wording version older than the template	**61**	**0**
Cause	**Documents built from an earlier file**	**The block comes from the template, never from a previous document**

That zero is not a setting: it is mechanical. No document is built from the previous one, so none can inherit an outdated version.

> **The file is produced with one click, at any date, on any scope** — one client, one adviser, one quarter. All it needs is the date compliance wants to see on it.

For compliance to set

Scope and date of the next review file: _____

LINDBERGH FORMATION — Blue Lemon Agent — Companies register (RCS) Évry 817 946 114 —
Legal notice (in French): bluelemonagent.ai/mentions-legales

Request a demo with your own documents

This document is a fictitious example. To see the agent work on your own documents, request a demo from its page.

https://bluelemonagent.ai/en/entreprises/cas-usage/agent-de-gestion-de-patrimoine-reporting

---

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.