



Compliance file — wording, charges and log

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

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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 No document is built from the previous one, so none can inherit an outdated version.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: _____

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 LINDBERGH FORMATION — a simplified joint-stock company with share capital of €250,000 · Registered office: 10 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114 · SIRET 817 946 114 00029 · VAT FR 60 817 946 114 · "Blue Lemon Agent" trade mark · Training-provider registration no. 119 108 635 91 (Île-de-France prefect — this registration does not amount to State approval) · Qualiopi certified, no. 03896, for the "training actions" category · contact@bluelemonagent.ai · dpo@bluelemonagent.ai · Hosted in France.

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.