

Apiax rolls out product- and tax-suitability product

Zurich, September 12, 2023 - Apiax announces the launch of a new product- and tax-suitability solution. Designed to bring cross-border and tax checks on financial instruments within a single, user-friendly environment, the new solution offers seamless integration capabilities with multiple data providers.

The new solution transforms how financial organizations evaluate the suitability of financial instruments for their clients.

Powered by industry-leading data and regulatory providers, the new solution is accessible as a web application or via API. It accelerates financial institutions' ability to identify the most suitable and tax-efficient investments for their clients and serves as a powerful compliance tool, enabling multiple use cases:

- Wealth managers can provide personalized investment advice tailored to their clients' needs.
- Investment teams can create model portfolios that meet complex cross-border regulatory and tax requirements.
- Portfolio managers benefit from the ability to identify suitable and tax-efficient products to optimize their portfolios.
- Asset managers can discover optimal distribution strategies for their products, expanding their market and client reach.
- Financial institutions can seamlessly integrate pre-trade compliance checks into their preferred investment tools.

"We've listened carefully to our customers' needs, analyzed market challenges and studied the competitive landscape to develop an advanced product placement solution that meets the demands of cross-border and tax compliance," said Thomas Schäubli, Head of Product Management at Apiax. "Our latest solution puts us at the forefront of the industry with an unwavering focus on speed, efficiency and a seamless user experience. The unparalleled flexibility offered by our integration capabilities positions us as the go-to solution for financial institutions."

Apiax invites financial institutions to explore the capabilities of Instruments Check and discover how it can transform their compliance processes. To learn more about its features, and how it can benefit your organization, visit apiax.com/instruments-check or contact the Apiax team for a personalized demonstration.

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About Apiax

With Apiax, financial institutions can easily navigate complex regulations and ensure compliance while driving growth and efficiency.

www.apiax.com