

# ONE VENDOR. ONE CALL.

One end-to-end tax information reporting solution

Today's information reporting requirements for banks and brokerages are complex and resource-consuming. In addition, fragmented vendor solutions create risk and cost challenges associated with compliance, vendor management, data integration, data accuracy and overall cost inefficiencies.

Refinitiv® Maxit®, the industry's only end-to-end tax information reporting solution, was developed specifically to solve these challenges, allowing firms to focus on their core business without the cost and distraction of managing multiple vendors and large operations teams.

## We deliver confidence in

### Cost basis reporting

- Back office agnostic, technology friendly solution
- Highly automated, deep integration with back office
- Provides trusted CBR compliance to over 100 registered firms

### Tax information reporting

- Agnostic to back office and cost basis reporting solution
- Increases accuracy and reduces corrections – to deliver a superior client experience
- Reduces the resources needed to support tax season operations

### Tax optimization

- Combines cost basis data and advanced portfolio analytics to deliver a better client experience
- Transparency into client portfolios to enhance client/advisor relationship
- Value-added insights help gather assets and protect and grow AUM

### Managed services

- Reconciliation services for cost basis and tax reporting
- Tax information reporting operations
- Streamlined business operations support

## Your firm benefits from

### Lower Cost of Ownership

- Bundled CBR and Tax Services with option for Managed Services
- Single SLA, Single Support Model
- Efficiencies driven through technical simplification

### Trusted Compliance

- Seamless integration of CBR & Tax diminish error rates and multi-system discrepancies
- Proven compliance services with over a decade of experience, delivered to over 100 firms
- Process driven compliance with Big 4 accounting firm, In-house Legal and Regulatory Teams maintaining and monitoring system compliance

### Functional Efficiency

- Automated CBR and Tax field validations ensuring data integrity
- Holistic system oversight provided by interactive dashboards for rapid response
- On-demand system control for defining and generating Tax Form PDFs for e-delivery and print purposes

### Technology Friendly

- CBR & Tax stored in a fully processed state
- 1099 Series and other forms available fully up to date on a daily basis
- CBR and Tax fully integrated into back office

Combining proven technology and processes, with decades of tax operation experience, Refinitiv Maxit delivers a solution that eliminates the burden of the tax reporting process for financial institutions.

Clients benefit from an end-to-end tax solution, delivered with transparent pricing, and gain a partner committed to solving their firm's specific business challenges.

### Industry-leading software backed by world-class expertise

Our team of experts has a wealth of experience in the following areas:

- |                             |                               |                          |
|-----------------------------|-------------------------------|--------------------------|
| • Tax information reporting | • Corporate action processing | • Cost basis conversions |
| • Tax regulation            | • Reconciliation              | • Brokerage operations   |
| • Cost basis reporting      | • Data architecture           | • Data analytics         |
| • Cost basis business       | • Data management             | • Tax optimization       |

Tighter integration. Higher data quality. Daily tax processing. Scalability. Minimized PII Risk.

Refinitiv Maxit delivers year-round confidence to eliminate year-end surprises.

## Simplify brokerage tax information reporting requirements with Refinitiv Maxit's end-to-end tax solution

Refinitiv is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.

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