

inApp Tax

Use Case 1 - Portfolio optimization and tax suitability

► SCENARIO

Patrick, a Chief Investment Officer at a Swiss bank, wants to optimize the bank's list of approved securities by evaluating tax suitability across markets. He also seeks to explore new markets for underperforming products.

► CHALLENGES

Patrick must assess specific tax implications for several jurisdictions, avoid tax-toxic investments, and ensure compliance without complex integrations.

MANUAL PROCESS

- ✗ Manually gather tax regulations and market data for each jurisdiction.
- ✗ Comparing tax suitability across multiple markets.
- ✗ Manual calculations, leading to delays and potential inaccuracies.



Several days, based on the complexity and number of involved jurisdictions and securities.

WITH INDIGITA

- ✓ Quick access to tax suitability insights and product evaluations, to avoid tax toxic products.
- ✓ Cross-country comparison in a simple and digital way.
- ✓ Save time to focus on strategic decisions and avoid mistakes.



A few seconds

► KEY ADVANTAGES OF INAPP TAX

- ✓ Ensures compliance with local tax regulations.
- ✓ Saves time and reduces error risks.
- ✓ Identification of new markets for underperforming products.
- ✓ Provides precise, country-specific tax insights for over 90 jurisdictions.
- ✓ Simplifies market suitability evaluations in a single, user-friendly platform.

INTERESTED?

Contact us at info@indigita.ch
Or, directly book a demo via QR code:



swiss made software

