

Croesus and Indigita partner to simplify tax-efficient portfolio management

Montréal and Geneva, 24th September 2024 - **Croesus and Indigita SA** have announced a **strategic partnership to simplify tax-efficient portfolio management for wealth professionals**. The agreement will integrate Croesus Central, Croesus's automated portfolio modeling and rebalancing solution, with Indigita's tax treatment and tax suitability data for 80 countries. This integration of two powerful solutions will allow wealth professionals to streamline their workflows effortlessly and incorporate tax considerations seamlessly before rebalancing portfolios. The ability to assess and minimize the tax impact on portfolios across different geographical markets and tax systems is crucial for protecting investments from negative tax consequences.

Romain Faraut, Director, Swiss Market at Croesus: "Private banks and wealth management professionals have clearly voiced their desire for wealth management solutions that consider the client tax implications of portfolio management decisions. Today's announcement is a strong commitment from both companies to answer their needs. Not only will wealth management professionals gain major productivity gains but ultimately, investors will get better after-tax returns as well."

Nabil Hatimy, Director, Head of Clients Delivery & Partnerships at Indigita: "Combining our expertise in international fiscal data for investments with Croesus's expertise in portfolio management is a natural fit. The fiscal consideration of a large number of portfolios from international investors has always been a tedious, complex, and costly activity. Now, we are removing this hurdle and switching the odds around by allowing international, tax-efficient portfolio rebalancing to become a value-adding task."

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About Indigita SA

Indigita SA is a Swiss regulatory (regtech) company headquartered in Geneva, which provides a suite of interactive trainings, digital tools and APIs to support financial institutions and their employees to conduct cross-border business in a safe and compliant way. Indigita is the regtech arm of the BRP Group and combines the industry-leading regulatory knowledge of its mother company BRP Bizzozero & Partners SA and its sister company BRP Tax SA with innovative digital channels. Indigita provides banks and asset managers efficient access to the most complete and up-to-date collection of cross-border rules for more than 190 jurisdictions.

www.indigita.ch



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About Croesus

Croesus provides innovative, high-performance, and secure wealth management solutions that include portfolio management systems, portfolio rebalancing tools, and application programming interfaces (APIs). These solutions empower wealth management professionals to improve their productivity, enhance their client relationships, make informed decisions, and maximize the management of their assets under management. Croesus's mission is to provide a superior experience to its clients, users, partners, and employees and to positively impact the community. With more than 200 employees in its Geneva, Montréal, and Toronto offices, Croesus has won several industry awards for being a high-quality solution provider and an outstanding employer.

www.croesus.com

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