

# Connect with Taskize



## Connect, resolve and scale

“We’ve partnered with Taskize to deliver streamlined, interoperable enquiry management solutions that meet the evolving needs of our clients.”



“Our rollout of Taskize was guided by the principle that clients must be one click away... real-time exchange is the new standard.”






“By leveraging Taskize’s email management, flexible API integration and traceability, our custody clients will be able to gain greater insight into the status of their queries.”



**Connect to counterparties easily**  
**Resolve queries and exceptions faster**  
**Scale your operations**

Taskize is trusted by over 600 firms across 88 countries to rationalise the finance sector's complex communications ecosystem.

From cashflow calculations to counterparty contact, the Taskize platform – and our five solutions – connect custodians to sub-custodians, buy-side to sell-side, brokers to FMIs... and all points in between. Taskize allows all these firms to scale by:

-  **Increasing operational capacity**
-  **Reducing regulatory risk**
-  **Improving client satisfaction**

In settlements, Taskize enables faster communication between counterparties – not least in a compressed T+1 environment – as well as predictive analysis and prioritisation of trades most likely to fail.

The collateral arena often faces valuation and portfolio mismatches, causing delays that heighten risk and challenge compliance and here Taskize streamlines communication and workflows to accelerate resolutions and ensure adherence to margin obligations.

In pre-trade, our platform is the glue between KYC/AML, onboarding and legal.

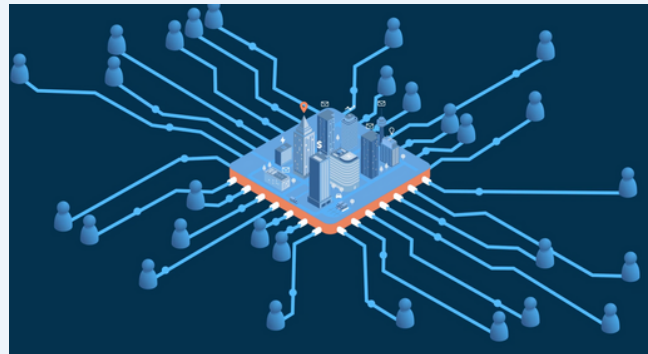
At the point of trade, we bring together operations teams supporting sales and trading teams' execution activities.

In post-trade, Taskize is the bridge between all counterparties: transaction management and transaction reporting, collateral management, settlements, asset services, reconciliations, tax and client services.

## Three key features of the Taskize platform

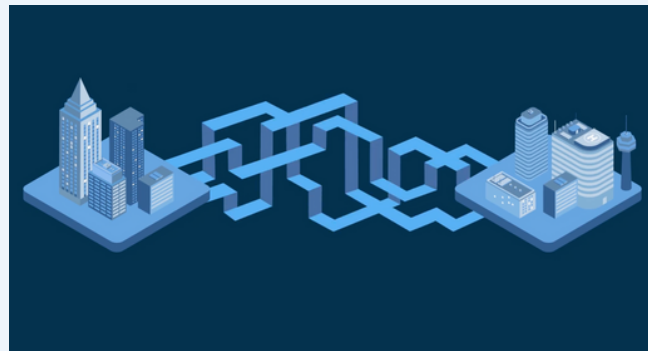
### Taskize Bubbles

Secure, micro-workspaces where counterparties can resolve issues together. Clients report a 70% decrease in resolution time compared to email. Bubbles provide clear responsibility and are easily passed across teams globally.



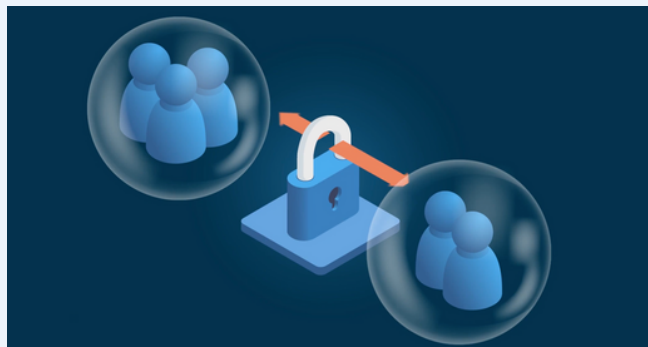
### Smart Directory

Route queries quickly and easily across clients, colleagues and counterparties. Our learning algorithm continually improves routing based on the resolution of every query processed.



### Bubble Blotter

A live view of all open issues for quick and efficient prioritisation and workload management – with the ability to delegate, substitute and escalate.



## Business solutions

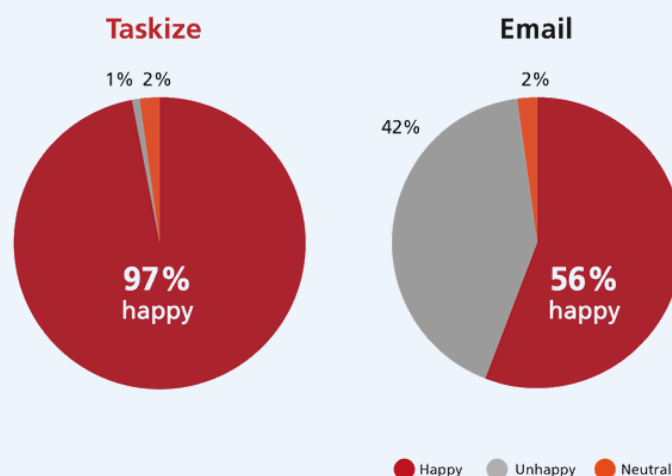
Taskize's business solutions solve real-world challenges in the financial sector with automated, scalable multi-party solutions. Technological innovation and industry expertise combine not only to deliver digital transformation but also cost and client experience transformation.

**“Collaborative efforts like this allow all stakeholders to see real-time changes and reduce operational friction.”**



## Communication solutions

Quick and easy to deploy, users of Taskize's robust, multi-faceted communications platform enjoy same-day resolution of 80% of their post-trade queries, compared to just 10% when using email and other legacy comms platforms.



Source: Client satisfaction survey, Euroclear

## Data solutions

Taskize data solutions give you ownership, oversight and control of post-trade operations and communications data. Unravel the complexities and inefficiencies in a fragmented market and lifecycle flow to ultimately increase productivity through data insights.

## AI solutions

Taskize uses artificial intelligence to accelerate and automate solutions to specific communications challenges, bringing the benefits of AI and large language models (LLMs) to all three aspects – people, process and technology – of operations lifecycles. To quote Fidelity Investments speaking at a Taskize InvestOps Workshop:

**“Predictive analytics and AI have immense potential – they can help us prevent exceptions before they occur...  
Generative AI can transform how we handle operations, making processes more efficient and reducing reliance on manual tasks.”**

## Interoperability solutions

Interoperability is at the core of the Taskize platform, delivering seamless integrations, allowing clients to capitalise on their tech investments, streamline operational processes and address the manual errors that arise when working across multiple platforms.

Our current integrations include Euroclear EasyWay, Finbourne LUSID, Meritsoft's TTEM, Symphony, Xceptor and Microsoft Teams.

## Our Euroclear partnership

Taskize is a member of the Euroclear group of companies. Euroclear is a global provider of Financial Market Infrastructure (FMI) services, helping its clients settle domestic and cross-border securities transactions and safekeep their investments.

“The key benefit in integrating Taskize with our collateral management workflow is to offer our counterparties a platform through which they can engage with us in a consistent, clear manner that **reduces cost, reduces risk and improves client satisfaction** across front, middle and back-office.”

– Mike Reece, Head of Euroclear Bank Client Services

“Our rollout of Taskize was guided by the principle that clients must be one click away from collateral expertise. For instance, **real-time exchange is the new standard** in the collateral ecosystem, and we are proud to arm clients with this capability at such a pivotal moment for the industry.”

– Bertrand Hanappe, Head of Collateral Client Services, Euroclear



Get in touch

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