



A quick introduction to Taskize



Top three benefits:

1

Automation

The Taskize platform can replace both email and manual workflow processes – and their inherent risks around human error and speed.

2

MI reporting

The platform's real-time data and analytics on settlement fail cause-and-effect further assists in operational and process optimisation.

3

Interoperability

Taskize integrates with numerous other platforms thus enhancing rather than replacing existing pre- and post-trade systems.

Three unique features:

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

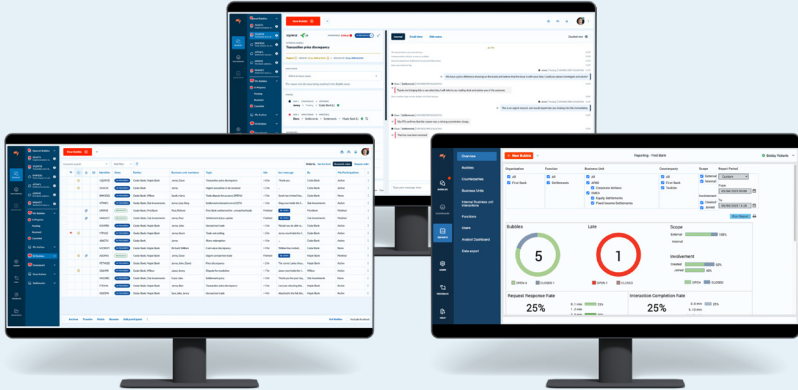
A live view of all open issues for quick and efficient prioritisation and workload management – with the ability to delegate, substitute and escalate.

Connect, resolve and scale

Taskize is one of the most influential fintechs in pre- and post-trade automation, trusted by over 550 financial firms – custodian banks, buy-sides, broker-dealers and FMs – across 88 countries.

Quick and easy to deploy, our interoperable, web-native collaboration platform is used by all investment operations teams including securities settlements, corporate actions and collateral management to:

- ✓ **Minimise risk**
- ✓ **Improve client service**
- ✓ **Increase capacity**



Taskize has been a success story for us and I would definitely encourage our peers to find out how it can improve their operational efficiency.

Gerardo Prieto Moreno, MD Capital Markets Operations – Santander Global Corporate Banking

Partnerships and integrations

- AccessFintech
- DTCC
- Duco
- Email connector
- Euroclear EasyWay
- EZOPS
- FINBOURNE Technology
- Meritsoft
- Microsoft Teams
- Salesforce
- Symphony
- Xceptor

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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.

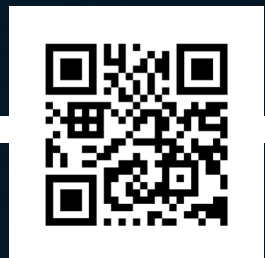
Global Head of Custody Product Development – Citi

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Taskize is a member of the Euroclear group of companies.