

How SS&C Tax BrightLine Complements Your Tax Advisor

SS&C Tax BrightLine is a **comprehensive, technology-powered solution** for tax compliance, reporting and analytics that enables fund managers to manage their tax exposure year-round in real time.

Allow SS&C's Tax BrightLine and supporting tax professionals to **free up your time** to focus on optimizing your fund investment tax strategies, while your tax advisor works on the **optimal tax strategy** for your business.



5 Ways...

Tax BrightLine helps enhance your investment tax strategy

Provides real-time data and analytics to factor tax impacts into investment decisions

Supports tax efficiency strategies, including tax-loss harvesting and wash sales/straddles

Long term holding period determination - including time to greater than 3 years and QDI analytics

Provides mark-to-market asset valuations for 475 Funds and 1256 determination

Provides accurate limited and general partner tax allocations

5 Ways...

Your tax advisor helps optimize your firm's tax position

Business and financial audit, assurance and attestation services

Provides M&A advice, business valuation and due diligence to maximize tax advantages

Organizational consulting to mitigate risks and expenses

Sarbanes-Oxley reporting and compliance

Final review and sign-off of SS&C Tax BrightLine form preparation

Maximize structural alpha while managing your tax exposure

Don't leave money on the table. Leverage SS&C Tax BrightLine to manage the tax impact of your investment decisions while meeting your regulatory and investor obligations.



The combination of Tax BrightLine and your professional tax advisor delivers the ultimate tax strategy for your funds and for your business.

Free up internal resources from tax-related activity

Leverage global tax expertise

Meet deadlines with accurate filings and avoid compliance risks

Take advantage of **state-of-the art technology** backed by an experienced servicing team that understands the nuances and complexities of taxes.

Contact us to request a demo