

# Broadridge and Xceptor Partner to Transform Global Tax Reclaims and Asset Servicing Operations

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New integrated solution automates withholding tax relief and reclaims processes, minimizing risk and enhancing compliance across global markets within Asset Servicing

NEW YORK and LONDON, Nov. 19, 2025 /PRNewswire/ -- **Broadridge Financial Solutions**, Inc. (NYSE: BR), a global Fintech leader, today announced a strategic partnership with **Xceptor**, a global leader in data automation for financial institutions, to offer a unified digital platform automating the global tax relief and tax reclaim lifecycle. With this partnership, Xceptor Tax will be integrated with Broadridge's Global Tax & Client Reporting Solution to create an end-to-end solution for multi-jurisdictional tax relief-at-source, tax reclaims, and digital regulatory filing.

"We are excited to partner with Xceptor as part of our broader strategic initiative to deliver a truly global, integrated asset servicing solution, including tax reclaims. Financial institutions face increasing complexity across tax operations amid intensifying regulatory requirements, market change, and surging transaction volumes," said Tom Burke, President of Global Asset Servicing, Broadridge Financial Solutions. "By combining Broadridge's market leading asset servicing infrastructure with Xceptor's next generation intelligent tax automation, we are enabling our clients to move beyond manual, fragmented processes – improving accuracy, speed, and compliance across markets."

Broadridge and Xceptor are creating a unified offering that connects data, documentation, and decision-making across the global tax and asset servicing lifecycle. Built on Broadridge's powerful, integrated platform technology and Xceptor's highly configurable and enterprise-grade platform, the combined solution enables ease of connection and out-of-the-box integration with existing systems. Through automated data flows, centralized documentation, and regulatory updates, clients can automatically identify Relief at Source (RAS) and Tax Reclaim opportunities, monitor eligibility, and seamlessly manage tax documentation. These new features will help firms achieve faster

reclaim processing, reduce operational risk and costs, and maintain compliance across complex, multi-market tax processes, and evolving global regulatory regimes.

"By combining our tax offering with Broadridge's solution, we are delivering best-of-breed product functionality, intelligent data automation, and deep domain experience for clients navigating complex tax environments," said Michiel Verhoeven, CEO of Xceptor. "Together, we're driving meaningful change across the industry, helping firms achieve the control, visibility, and scalability they need to transform tax operations and efficiency globally."

This new solution supports Broadridge's goal of offering the most comprehensive end-to-end asset servicing platform in the market and addresses the industry's need for a single, digitized, scalable, and compliant tax automation framework. Together, Broadridge and Xceptor are empowering financial institutions to transform their global tax operations – driving greater compliance efficiency, improving client outcomes, and future-proofing operations against market and regulatory change such as MiKaDiV and EU FASTER.

## About Broadridge

Broadridge Financial Solutions (NYSE: BR) is a global technology leader with trusted expertise and transformative technology, helping clients and the financial services industry operate, innovate, and grow. We power investing, governance, and communications for our clients – driving operational resiliency, elevating business performance, and transforming investor experiences.

Our technology and operations platforms process and generate over 7 billion communications annually and underpin the daily average trading of over \$15 trillion in equities, fixed income, and other securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 15,000 associates in 21 countries.

For more information about us, please visit [www.broadridge.com](http://www.broadridge.com).

## About Xceptor

Xceptor is a global leader in data automation for financial institutions, specialising in capital markets. Trusted by over 125 clients and 11,500 users across 60 countries, it empowers business users to take control of their data and streamline processes with AI, while minimising risk.

Xceptor's Data Automation Platform helps financial institutions unlock efficiency across the full trade lifecycle by automating data ingestion, standardisation, normalisation, and validation. Powered by auditable AI, business users can ensure trusted data and build automated processes – reducing errors, time, and cost, while minimising reliance

on technical teams.

The highly configurable and enterprise-grade platform also underpins Xceptor's purpose-built solutions, including Xceptor Tax, Xceptor Reconciliations, and Xceptor Post-Trade Operations, designed to streamline workflows and regulatory compliance within core trading functions.

For more information, visit [www.xceptor.com](http://www.xceptor.com).

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