

ARCHER'S INTEGRATION WITH PROPRIETARY AND THIRD-PARTY TAX OPTIMIZERS



As investors continue to prioritize tax optimization in their portfolios, managers are developing new tax-aware solutions for both actively managed and direct indexing accounts.

Archer's open architecture solution enables investment managers to quickly bring tax-efficient strategies to market. Managers can leverage a proprietary or third-party optimizer and customize the data to meet their business needs. Below are examples of how Archer helped investment managers deliver tax optimized solutions with efficiency, flexibility, and scale.

proprietary tax optimizer

A manager with a proprietary tax optimization platform was experiencing rapid growth as investors sought out their tax optimized investment solutions. To successfully offer this product at scale, they needed to be able to ensure that they could easily connect to new sponsors and receive lot-level detail that integrated with their optimizer so they could focus on making investment decisions.

Working with Archer, the team established a process that enabled the manager to receive a start of day file with lot-level detail. Archer's technology and integrations ensured that data was normalized across all sources so the manager could quickly identify which lots to buy and sell and easily update their models. The ease of the process along with the connectivity to all major sponsors enabled the firm to grow its tax optimized accounts by more than 30% in the years that followed.

third-party tax optimizer

After seeing success in its separately managed account strategies, a manager was looking to meet client demand for tax optimization. The manager began to identify a process to overlay tax optimization, but quickly realized that having the right data and automating the process would be critical to their success.

The manager already worked with Archer and was aware that tax optimization and integration were key components of the technology. After identifying a third-party tax optimization partner, the team worked with Archer to learn best practices and ensure integration with sponsor platforms. Archer's technology enabled them to easily integrate and set up streamlined processes for exchanging data so they could easily bring their new strategies to market.

Archer's solution enables investment managers to develop tax-aware solutions that are optimized across a wide range of constraints, including industry, sector, country, currency, transaction cost, multi-account, for both active and passive while using multiple currencies.

LEARN HOW PARTNERING WITH ARCHER ENABLES MANAGERS TO DELIVER CUSTOMIZATION AT SCALE

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