

Extract. Transform. Automate

The tax document burden

Financial institutions handle vast amounts of complex tax documents – withholding certificates, tax reclaim forms, beneficial owner declarations, and more. These documents arrive in countless formats with critical data buried in unstructured fields, making manual processing slow, error-prone, and costly.

Traditional OCR falls short on tax documents due to format changes and handwritten content, limiting their accuracy and value. Many custodians and banks want to leverage AI to automate tax document workflows, but struggle with implementation, integration, and governance at scale.

Seamless AI for smarter tax document processing

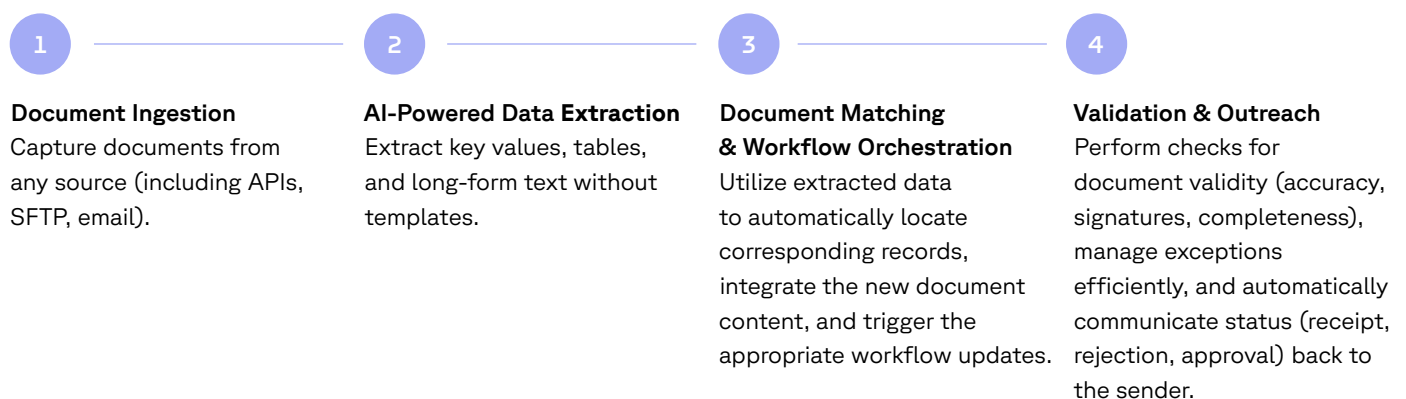
Xceptor's AI-powered Document Intelligence transforms how financial institutions process tax documentation. By combining advanced AI with our market-leading data

automation capabilities, we enable tax departments to extract, validate, and integrate critical tax data – without relying on rigid templates.

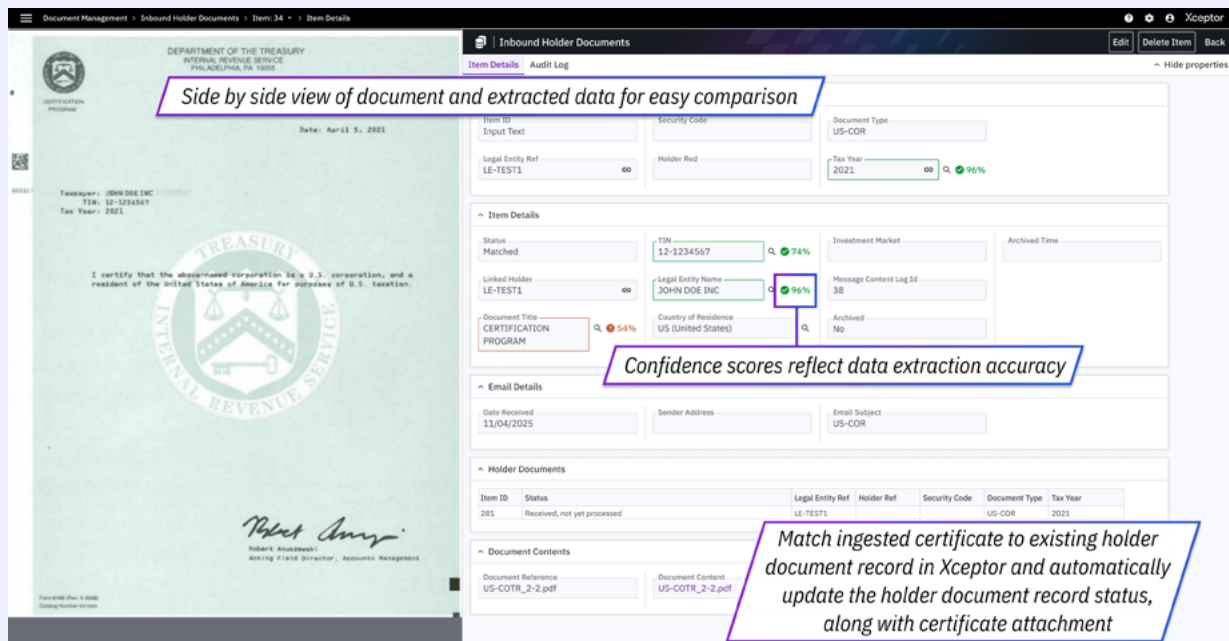
With Xceptor, AI works seamlessly within your existing tax workflows, helping you:

- **Automate tax document processing** – Extract data from any withholding tax or reclaim format, including unstructured text fields, handwritten forms, populated check boxes, and information on dotted lines.
- **Ensure accuracy and control** – Apply tax-specific business rules for validation and maintain full audit trails for regulatory confidence.
- **Orchestrate end-to-end tax workflows** – Automate handoffs between AI, tax systems, and specialists for efficient operations and faster reclaim processing.
- **Deploy AI at scale** – Use pre-built tax document models or integrate your own, with real-time monitoring for performance tracking across your tax operations.

How we achieve greater straight-through processing (STP) while maintaining auditability



Detailed MI and reporting available from the same UI.



Key Features

- **AI-Driven Data Extraction** – Eliminate manual errors with automated, scalable extraction from unstructured documents, including handwriting and tables.
- **Intelligent Text Analysis** – Use LLMs to classify, translate, and analyze document content.
- **Customizable Validation** – Tailor validation rules to meet specific regulatory, client, or business needs.
- **Flexible AI Model Integration** – Choose pre-built models or integrate your own for greater control.
- **Multi-Source Data Integration** – Integrate validated data across various applications and workflows.
- **Enterprise-Grade Governance** – Maintain full transparency with audit trails, role-based permissions, and model monitoring.
- **No-Code Interface** – Empower business users to configure and manage workflows without IT dependency.
- **Smart Document Segmentation** – Automatically split single PDFs containing multiple tax documents into individual files, streamlining processing and reducing time spent on bulk scanned documents.

Book a demo

Xceptor