

Use Case: National and international

As a robo advisor, Yova offers its customers sustainable, digital investment solutions. The all-inclusive fee, which depends on the investment volume, already includes the annual provision of tax documents.

In cooperation with Saxo Bank (Schweiz) AG as Yova's custody bank, datalevel is responsible for the complete technical preparation of the e-tax statements. The securities data and income events used to determine the tax values are reconciled with the current rate list data from the Swiss Federal Tax Administration. In the process, the multi-custody and multi-portfolio cases are consolidated into one statement.

At the same time, datalevel handles the creation of international income statements based on current and legacy bank data. One component of the service agreement between Yova and datalevel includes the approval process by the Swiss Tax Conference required for the delivery of e-tax statements.

The entire process chain for creating the reports is managed by datalevel without transmitting sensitive customer data. Before delivering them electronically, Yova supplements the documents with a cover sheet containing the customer's details.



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