

UK Tax Strategy Statement

SS&C Technologies Holdings, Inc. ("SS&C") is, through its subsidiaries, a global provider of investment and financial software-enabled services and software for the global financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut and has offices around the world. Some 22,000 financial services and healthcare organizations, from the world's largest institutions to local firms, manage and account for their investments using SS&C's products and services. SS&C is a publicly traded company on the NASDAQ.

This tax strategy applies to all direct and indirect UK subsidiaries of SS&C, in accordance with Schedule 19, Paragraph 19 of Finance Act 2016.

This tax strategy applies to UK taxes and duties set out in paragraph 15(1) of the Schedule which includes Corporate Income Taxes, PAYE, NIC, VAT and Stamp Taxes.

Our Approach to Tax Risk Management and Governance

Identification, mitigation and management of risks are central to our strategy. Tax risks arise due to the complexity of tax legislation and potential differences in interpretation. We have processes in place to ensure the integrity of our tax filings and tax compliance obligations in the UK and worldwide. Our tax processes are subject to the same level of internal controls, review and external audit as the rest of the business.

We continuously identify and manage risks and opportunities that could affect the achievement of our business plans and strategic objectives, our shareholder value and our reputation. Risk management and its governance thereunder is embedded in our internal controls, which are set by Management.

Our policy is that criminal tax evasion, or the deliberate facilitation of such tax evasion, is unacceptable. We have adopted appropriate procedures and controls intended to reduce the risk of the facilitation of tax evasion by those acting on our behalf, in accordance with the Criminal Finances Act 2017.

Our Attitude to Tax Planning and Tax Risk

We are committed to compliance with our tax obligations. We engage in tax planning that supports our business activities and that has commercial substance. We aim to ensure that our tax positions in any tax planning activity are consistent with the underlying economic consequences and relevant tax law. We seek professional advice from independent external tax advisors on matters that are technically complex.

Our policies and governance framework operate to ensure compliance with tax laws and regulations both in the UK and worldwide, and to ensure that we identify and mitigate tax risks.

Our tax affairs are managed by our Tax Officer and members of the global tax department with assistance from the entire finance organization.

The UK Boards of Directors also have oversight of the tax strategy in relation to their legal entities.

Our Approach to Dealing with HMRC

We seek to have a transparent, professional and cooperative relationship with HMRC based upon mutual trust and compliance. We strive to have regular meetings with HMRC and communicate significant developments and changes in our business. We seek to discuss any tax issues that may arise at an early stage. We aim to respond to information requests in a timely manner and that relevant information is provided to HMRC. Any inadvertent errors in submissions made to HMRC are fully disclosed as soon as reasonably practicable after they are identified.

SS&C regards its publication of this tax strategy as complying with the duty under paragraph 16(2) Schedule 19 Finance Act 2016 to publish a tax strategy.

Approved by the Audit Committee on February 5, 2025