

Halcyon Announces Integration with Finastra to Streamline 8821 Tax Transcript Authorization and Income Verification

The Halcyon 8821 integration is now available to Finastra's MortgageBot customers across North America.

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[Halcyon](#), a leading provider of digital income and tax verification solutions, today announced a new integration with Finastra, a global leader in financial services software, to enable seamless digital management of IRS Form 8821 authorizations within Finastra's Mortgagebot solution. This integration provides financial institutions with a faster, more secure way to retrieve and manage tax transcript data for income verification.



Halcyon

Halcyon's 8821 solution enables lenders to collect borrower authorization for IRS tax transcripts via a streamlined digital experience, then retrieves the verified income data directly from the IRS through automated processes. By integrating directly into Mortgagebot workflows, the solution eliminates manual steps, reduces processing time, and enhances borrower satisfaction.

"Financial institutions are under growing pressure to verify income quickly and compliantly while delivering a seamless digital experience," said Mary Kay Theriault, Senior Director, Product Management at Finastra. "By integrating Halcyon's 8821 tax transcript solution into our partner ecosystem, we're giving our customers a faster, more secure alternative to traditional verification methods that helps accelerate time to close."

Halcyon's 8821 product supports a wide range of use cases across mortgage, personal, and

business lending, offering flexible borrower onboarding and real-time authorization tracking. The integration ensures that tax data is retrieved securely and presented directly within Finastra's platform, eliminating the need for borrowers to manually upload documents.

"Our goal is to simplify income verification through automation and secure data access," said Kirk Donaldson, CEO of Halcyon. "Integrating with Finastra brings that efficiency and compliance to the heart of the lending process, helping financial institutions reduce friction and close loans faster."

The Halcyon 8821 integration is now available to Finastra's MortgageBot customers across North America.

To learn more, visit www.halcyonsw.com.

About Halcyon

Halcyon delivers modern tax and income verification solutions that help lenders streamline loan processing, improve borrower experience, and meet compliance standards. With a focus on digital authorization and secure data retrieval, Halcyon's platform simplifies the way financial institutions access IRS transcripts and verify income at scale. Halcyon is trusted by lenders nationwide to automate and accelerate decisioning across mortgage, consumer, and commercial lending workflows.

About Finastra

Finastra is a global provider of financial services software applications across Lending, Payments, Treasury and Capital Markets, and Universal (retail and digital) Banking. Committed to unlocking the potential of people, businesses and communities everywhere, its vision is to accelerate the future of finance through technology and collaboration, and its pioneering approach is why it is trusted by ~8,100 financial institutions, including 45 of the world's top 50 banks. For more information, visit finastra.com.

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