



# Brokerage Firms

## The Mandate

### Looking after your clients

Brokerage firms are among GlobeTax's key clients.

Brokers who wish to provide the benefit of withholding tax reclamation to their clients are faced with the fundamental issue of servicing a significant number of clients of varying residencies and tax filing statuses. GlobeTax automates the tax reclamation process and addresses the associated complexities of this issue.

## The Need

### Streamlined Tax Processing

- An automated, preferably STP withholding tax recovery service
- Summary and Detail reporting (both internal and client)
- Reconciliation of positions and entitlement amounts and direct credits to client accounts
- Zero backlogs, zero fails and faster than average recovery benchmarks
- Confidence that ALL RECLAIMS will be identified and followed to completion
- Knowledge that changes to tax regulations will be adopted and implemented immediately
- "Check the box" for compliance to tax reclamation benchmarks for clients.

## The Solution

### GlobeTax will:

- Cross check each file
- Support the sourcing and renewal of Certification of Residency documentation
- Calculate for reclaims or relief at source
- Complete the relevant documentation
- File **ALL** eligible tax reclaims and follow them through
- Provide status reports for both brokers and their clients
- and finally... CREDIT YOUR CLIENTS' ACCOUNTS

With GlobeTax, there is no fuss, no hassle, no expensive tax department and no mistakes. You send one file a month. GlobeTax does all the work. Custodians receive automated credits to client accounts and automated reporting - **Streamlined Tax Processing** for your organization

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