

Financial institutions know that relief at source is the most efficient solution for providing their clients favorable withholding tax rates. However, it remains a challenging process to manage due to:

- **constant changes** of market rules and procedures;
- the **voluminous library of documents** that must be sourced from each investor, which require annual upkeep and maintenance; and
- **tight deadlines** to provide investor information through the custody chain to the paying agent.

MIDAS™: The Global Relief at Source Gold Standard



Automates data loads and validates beneficial owner information



Reconciles income payments and provides detailed allocation breakdowns in any currency



Procures and maintains compliant documentation to secure most favorable rates



Serves accounts for direct beneficial owners (segregated) and indirect holders (omnibus)

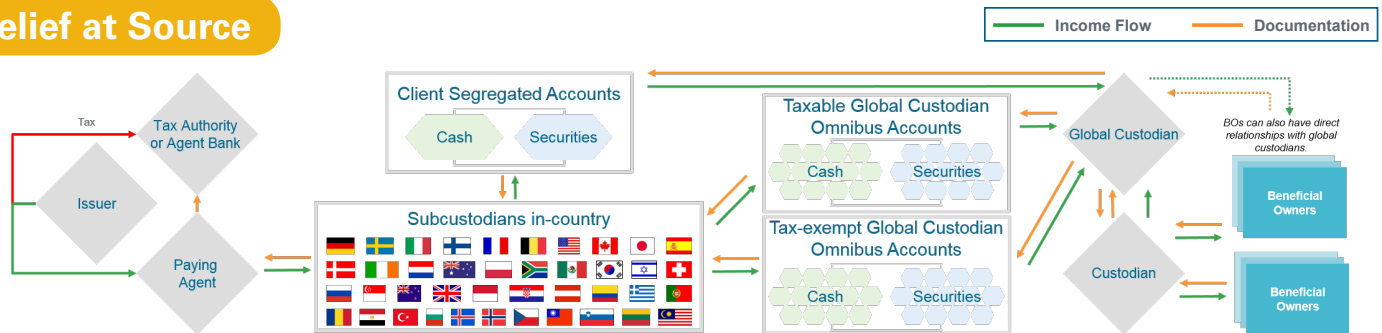


Processes a variety of income events across multiple investment types



GlobeTax is audited & certified to ISO 27001 Data Protection Standards, and is a participant in the EU-U.S. Privacy Shield Framework.

Relief at Source



— or —



MIDAS administers the entire relief at source process, and is able to streamline and enhance financial institution functions.