

Beneficial Owners

GLOBETAX

Are you receiving all your cross-border investment entitlements?

Investors with cross-border investment income are often entitled to withholding tax refunds or tax relief at source, depending on several factors including tax residency, legal status and the existence of double taxation treaties. GlobeTax identifies potential tax recovery entitlements, files reclaims, and ultimately credits client accounts directly with funds recovered.

We service all beneficial owner types including:*

- Asset Managers
- Foundations
- Mutual Funds
- Partnerships
- SICAVs
- Corporations
- Hedge Funds
- Nominees
- Pensions
- Sovereigns
- Family Offices
- Individuals
- Omnibus
- Proprietary Trading
- Trusts

**This is not an exhaustive list. Contact us for more information.*

The GlobeTax Advantage



Collects and renews all required documentation for claim filings.



Provides detailed client reports and a dedicated relationship manager to all clients.



Benefits from strategic long-term relationships with all major prime brokerage firms, global custodians and foreign tax authorities.



Offers proprietary suite of ePortals allowing for electronic document creation, submission and management.



Acts as a back-stop, monitoring income (dividend and interest) and filings as recovery events arise.

Our Approach: Automated Tax Recovery

- GlobeTax can analyze the level of tax reclamation services an organization is currently receiving, free of charge.
- GlobeTax receives beneficial owners' income data from custodians on a monthly basis.
- Access to GlobeTax's **Client Portal** for quarterly reports on outstanding and recovered reclaims.
- **eDocs**, a secure online document creation and data submission tool, allows GlobeTax clients to submit beneficial owner information.

OVER

7,000,000

RECLAIMS PROCESSED A YEAR

**Bonds,
Bank Debt**

FIXED INCOME

INSTRUMENT TYPES

ORDs

FOREIGN ORDINARY SHARES

**ADRs, GDRs,
IDRs**

DEPOSITARY RECEIPTS

GlobeTax fees contingent and payable only after money has been recovered.

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