

Benefits of Foreign Withholding Tax Recovery

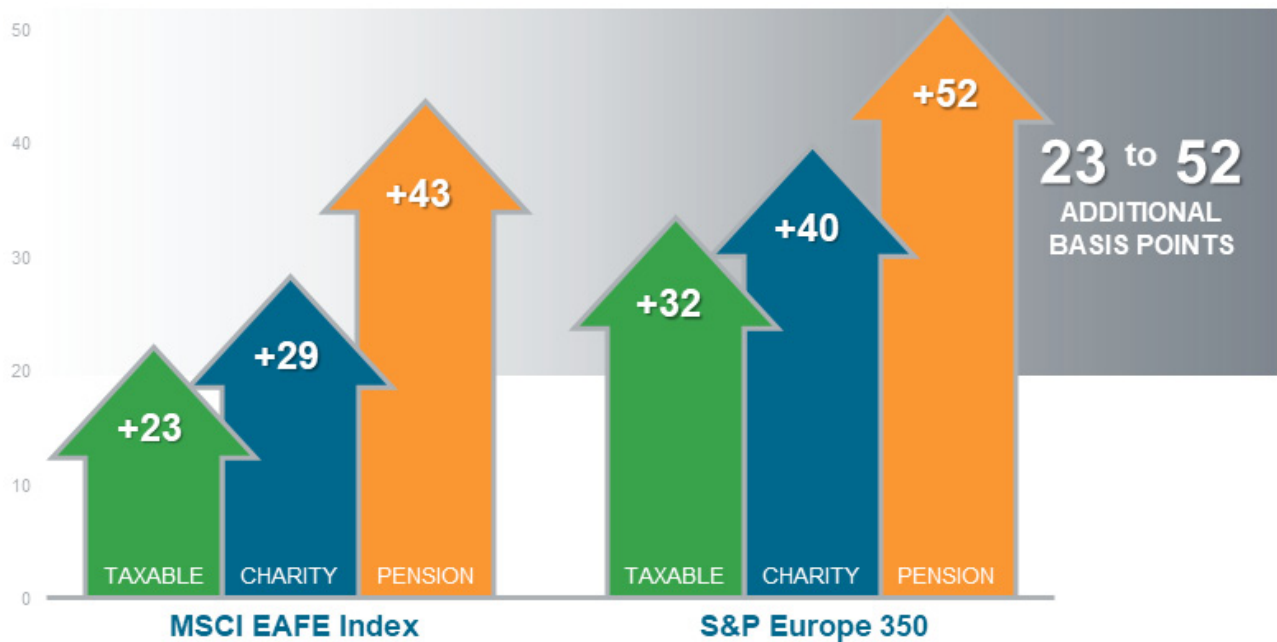
Are you maximizing your investment performance?

Many foreign governments withhold excess tax on dividend and interest payments to non-resident shareholders. As a result, investors whose portfolios benchmark major global indices may be over-paying taxes. Portfolios benchmarked to such indices will experience a drag on performance if investors do not actively seek to reclaim foreign withholding taxes.

U.S. investors using these indices as benchmarks can expect to add 23 to 52 basis points to annual portfolio performance, risk free, through the recovery of tax entitlements

- Taxable Investors + 23 / 32 bps
- Charities and Endowments + 29 / 40 bps
- Pension Funds + 43 / 52 bps

Benefits for U.S. Investors



Reclaimable value estimates are based solely on the reclaimable value calculated using dividend events, as received by an ETF modeled on the specific indices over a one year period, January 2019 - December 2019.

Contact us for a free analysis to see how your fund can benefit from our tax reclamation services.