

Prime Brokers

Looking to add tax recovery services for clients at no risk?

While recovering excess withholding tax is very valuable for a prime broker's clients, administering the process can be complex. Small errors can cause clients to miss their cash entitlements. In addition, prime brokers must conform to very specific data protection and confidentiality protocols.

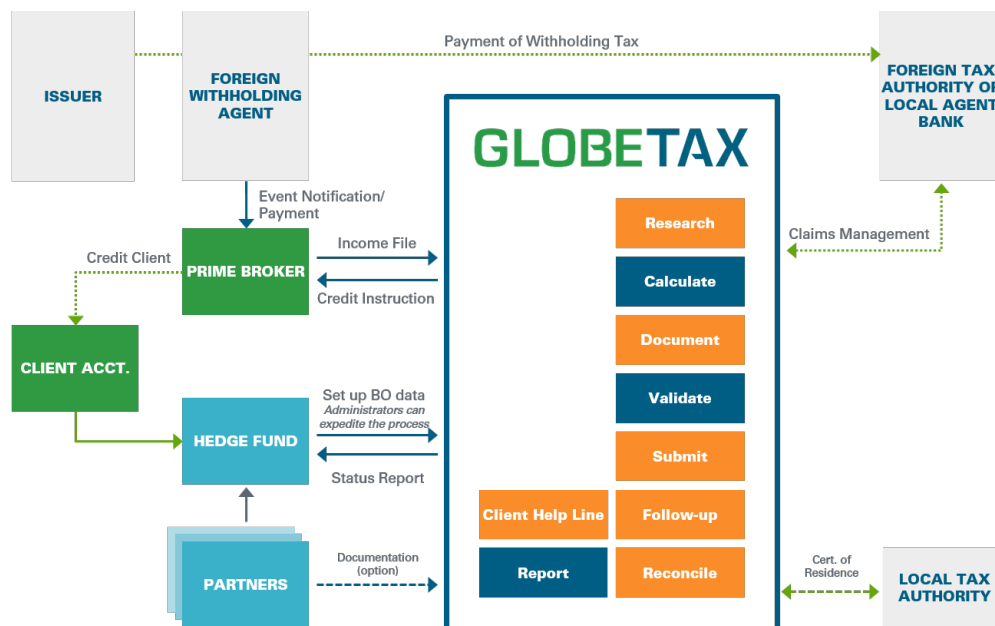
Excess withholding tax recovery can be offered to clients without added cost or breach of confidentiality through GlobeTax's streamlined reclamation process; GlobeTax services over 750 hedge funds.

The GlobeTax Advantage

-  Collects and renews all required documentation for claim filings.
-  Provides detailed client reports and a dedicated relationship manager to all clients.
-  Maintains confidentiality by contracting directly with funds.
-  Acts as a back-stop, monitoring income (dividend and interest) and filings as recovery events arise.
-  Trains Relationship Managers to effectively explain the withholding tax issue and its value to clients.

Our Approach: Automated Tax Processing

- Changes to tax regulations will be adopted and implemented immediately.
- Automatic reconciliation and direct credits to client accounts.
- Access to GlobeTax's **Client Portal** for quarterly reports on outstanding and potential reclaims.
- **eDocs**, a secure online document creation and data submission tool, simplifies beneficial owner onboarding for GlobeTax clients.
- **eTaxData**, GlobeTax's strategic online withholding tax information tool, is used by Prime Brokers in the planning, research and management of dividend withholdings.



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

GlobeTax.com

Info@GlobeTax.com

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