

# Registered Investment Advisors **GLOBETAX**

How can tax reclamation improve portfolio performance for your clients?

GlobeTax provides a specialized service to recover over-withheld tax for Registered Investment Advisors (RIAs) and their varied client base. The service identifies potential entitlements, files reclaims, and ultimately credits their account directly with all funds recovered. For RIAs, this results in improved performance, greater client satisfaction and further demonstrates that you are looking out for their best interest.

## 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.



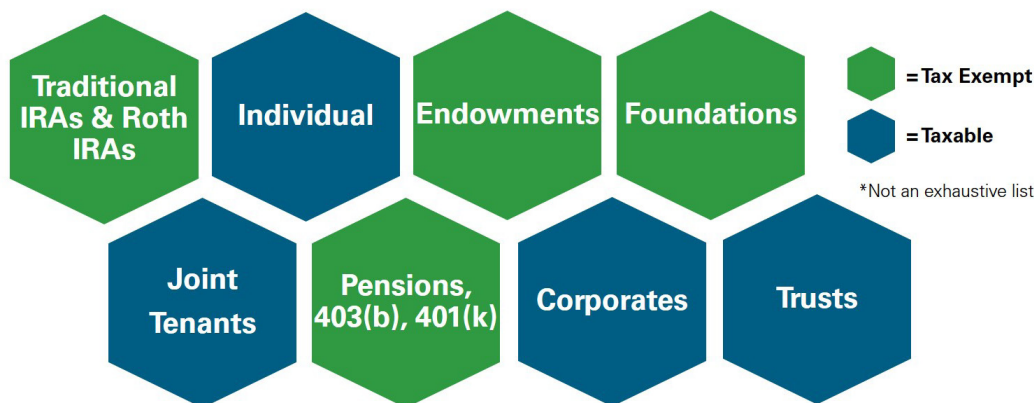
Offers proprietary suite of ePortals allowing for electronic document creation, submission and management.



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

## Our Approach: Automated Tax Processing

- Sign-up is an easy, one-time procedure, and involves execution of simple documents authorizing us to obtain Certifications of Tax Residency.
- 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, which simplifies beneficial owner onboarding for GlobeTax clients.



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

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