

Transfer Agents

How can you better service non-resident issuer clients?

GlobeTax works with Transfer Agents to provide enhanced tax relief and recovery services for their non-resident issuer clients holding equity and fixed income instruments. GlobeTax coordinates the recovery of over-withheld taxes on employer issued shares based on the residency of employee and double tax treaties.

We centralize the process ensuring that employee plans can maximize dividend proceeds for their non-resident employees, by availing them of the lowest possible withholding tax rate.

The GlobeTax Advantage



Assists Transfer Agents in organizing and managing tax recovery processes for holders of equity and debt instruments in applicable markets.



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



Collects and renews all required documentation for claim filings.



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

Our Approach: Automated Tax Reclaim

- GlobeTax works as the issuer's agent through its proprietary **ESP** system to allow seamless disclosure by all intermediaries in the chain, fulfilling the issuer's regulatory identification obligation to its domestic tax authority.
- **ESP** simplifies the withholding tax reclaim process by automatically creating many of the documents required by foreign governments, and eliminating the need for documentation where possible.
- **eCerts** allows investors to electronically complete an application for a Certificate of Tax Residency, used to apply for favorable withholding tax rates under certain double taxation treaties.

