

Wealth Managers

How can your clients benefit from tax recovery services?

Any investor with meaningful foreign holdings can benefit from tax reclamation. However, the process is intricate and time-consuming. GlobeTax provides a specialized service to recover over-withheld tax for Wealth Managers and their many different types of investing clients through strategic long-term relationships with virtually all major Custodians and Prime Brokerage Firms.

For wealth managers, reclamation results in improved performance, greater client satisfaction and further solidifies that you are looking out of their best interest.

The GlobeTax Advantage



Sign-up is an easy, one-time procedure.



Acts on investors' behalf to identify potential entitlements, file reclaims, and credit accounts directly with all funds recovered.



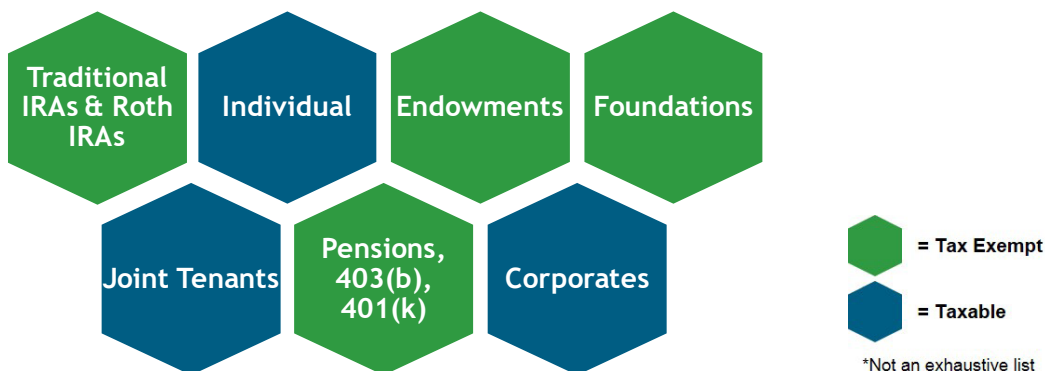
Offers proprietary suite of ePortals allowing for electronic document creation, submission and management.



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

Our Approach: Automated Tax Recovery

- Changes to tax regulations are adopted and implemented immediately.
- GlobeTax obtains Certifications of Residency and files reclaims on investors' behalf.
- **eDocs**, a secure online document creation and data submission tool, simplifies beneficial owner onboarding.
- **eTaxData**, GlobeTax's strategic online withholding tax information tool, enables wealth managers to plan, research and manage dividend withholdings.



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

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