



## Certification of Residency Tool

### eCerts

Most countries require proof of residency in order to recover overwithheld tax. For example, for U.S. residents a Certification of U.S. Tax Residency, or IRS Form 6166, is the universally accepted standard. In other markets, documentation requirements vary. eCerts allows investors to electronically complete an application for certification of residency in a variety of popular markets. These certifications can be used to file for favorable rates of withholding tax guaranteed under double taxation treaties.

### Features

#### With eCerts users may:

- **Initiate** an application for a certification of residency. Examples include the IRS Form 8802 and Irish Forms V2 and V3
- **Track** the status of each application submitted
- **Store** documents for periodic renewal
- **Submit** documentation to broker for election (in available markets)

### Users

#### eCerts is available for use by a variety of shareholder types:

- **U.S. Beneficial Owners**
  - Create Certifications of Residency for all available markets
  - May generate as many or as few Certifications as needed
- **Employee Shareholder Plans**
  - eCerts provides the mechanism to file for relief entitlements
  - Service may be engaged by plan administrator
- **Registered Shareholders**
  - eCerts may be utilized to provide shareholder relief on specific issues
  - Service may be engaged by the issuer

### Availability

eCerts is accessible through the GlobeTax website.

For more information, please contact GlobeTax

Email: [eCerts@GlobeTax.com](mailto:eCerts@GlobeTax.com)



## Security

eCerts is password protected. Each user creates their own secure account.

A password is required to enter the system and create/view all documents.

## About GlobeTax

Founded in 1992, GlobeTax specializes in the recovery of tax which has been over withheld on cross-border investment income, servicing clients in over 40 jurisdictions worldwide. GlobeTax provides a fully outsourced tax reclamation service for investors who hold both American Depository Receipts (ADRs) and foreign ordinary shares.

GlobeTax also acts as the sole outsource tax reclaim processing agent to the four US banks issuing ADRs: The Bank of New York Mellon, Citi, Deutsche Bank and JPMorgan Chase. GlobeTax maintains withholding tax research on over 230 jurisdictions worldwide and processes over two million tax reclaims per year, making GlobeTax the largest tax reclaim filer in the world.

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