



eDocs

eDocs is an online document creation and data submission tool. The system allows GlobeTax clients to log in to a secure portal and submit beneficial owner information. Using the information entered, eDocs creates the specific documentation required for each client to benefit from GlobeTax's tax reclaim service. eDocs is available for use by financial advisors at participating financial institutions.

Features

eDocs will:

- Accept submissions of beneficial owner data by manual entry or Excel spreadsheet upload. This allows the user to submit large batches of data in a single process
- Generate documents necessary to file tax reclaims for each beneficial owner type
- Automatically populate documents with beneficial owner information
- Allow the user to email documents to themselves and/or others for execution, as well as store them in the system for viewing and printing
- Allow the user to view all past transactions, including document status
- Notify the user of any errors made when entering account information

Security Features

eDocs is password protected, and only available to authorized users.

A password is required to view all documentation, whether it is stored in the system or emailed.

All information submitted to and stored in eDocs is protected by VeriSign 128-Bit Encryption.

Availability

eDocs is available as a fully customizable service for financial institutions and can be accessed through the GlobeTax website. Financial advisors at participating institutions may obtain more information from their manager.

To enroll, please contact GlobeTax's Client Services department
Email: ClientServices@GlobeTax.com