



Prime Brokers

The Mandate

Serving Your Clients

Relationship Managers are continually looking for ways to improve services and deliver solutions to their clients. Given the relative complexity of Prime Broker clients, the resources required to manage all client's needs in-house is considerable.

This is an especially important consideration when it comes to withholding tax recovery, for two reasons. While recovering excess withholding tax is very valuable for a prime broker's clients, it can be extremely complex. Even small errors can often cause clients to miss their cash entitlements. Secondly, prime brokers must conform to very specific data protection and confidentiality protocols. GlobeTax has the systems, dedicated data formats, and experience to automate tax recovery for a Prime Broker's clients.

The Solution

What can be done?

- GlobeTax provides prime brokers with a complete outsourcing solution to help them overcome these issues and create a real benefit for their clients, at no risk or cost to them.
- GlobeTax provides training designed specifically for Relationship Managers, so that they can better explain the withholding tax issue and its value to clients.
- Prime Brokerage clients are able to benefit from withholding tax reclamation as a value-added service. Prime brokers can offer this service without an added cost or breach of confidentiality.

About Us

GlobeTax:

- Provides tax reclamation services to hundreds of hedge funds, endowments and foundations
- Founded in 1992, is the world's pre-eminent withholding tax recovery expert, filing over two million reclaims a year with a 0.00% fail rate
- **Fees are entirely contingent and payable only after money has been recovered**

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