

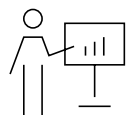
Tax Solutions: Global Withholding and Relief at Source

Automate the process of identifying and applying the most efficient tax withholding rate across 40+ global jurisdictions

The process of withholding tax accurately and advantageously for global clients and portfolios is an increasingly complex operation. Managing tax withholding as a manual process has always been inefficient, but with over 3,000 tax treaties now active worldwide, it has become nearly impossible.

S&P Global Market Intelligence's Global Withholding and Relief at Source replaces time-consuming, risk-prone manual processes with an automated workflow and a configurable, rules-based, end-to-end tax compliance engine that identifies, validates and applies the correct and optimal withholding rates at source for multiple jurisdictions globally.

- Captures, validates, and reviews local tax documentation and certificates.
- Integrates tax rate data and transaction and payments information via APIs.
- Confirms eligibility for the most efficient tax withholding rate.
- Continually updates to reflect the most current treaties and rates data.
- Enables you to review and advance due diligence tasks from a single dashboard.



Performance dashboards

Monitor the health of your tax due diligence processes across multiple jurisdictions. Track, assign, escalate, and remediate due diligence tasks. The dashboard provides a snapshot of key performance indicators across the workflow, including expiration campaigns, invalid form remediation, and missing documentation.



Account-holder views

Manage the account-holder due diligence process across a variety of tax regimes with a holistic view of clients across multiple jurisdictions. See audit history, tax documentation, and withholding rates, and service the account from the dashboard, including uploading documents, managing client outreach, and opening tasks.

Key Stats

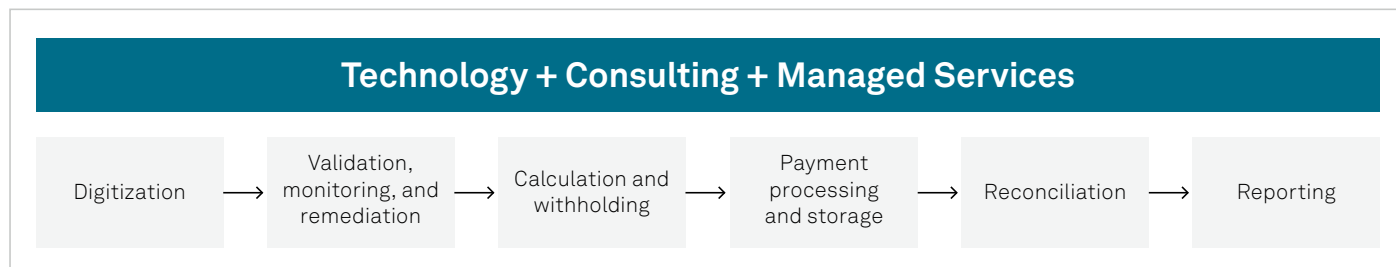
46 +
markets covered
for Tax Reclaims

40 +
RAS jurisdictions
covered

100 +
years of Section
1441 and AEOL
experience

An end-to-end tax solution ecosystem

Global Withholding and Relief at Source is part of an **integrated ecosystem of Tax Solutions** designed by leading industry experts. No matter which jurisdictions or regulatory obligations your business encounters, S&P Global Market Intelligence offers proven, integrated solutions that enable you streamline tax compliance processes and scale operations from end to end — all within a single ecosystem.



Why choose S&P Global Tax Solutions?

When you choose Tax Solutions from S&P Global Market Intelligence, you are investing in an ecosystem of trusted solutions that combine subject-matter expertise with leading workflow technologies.

Leading tax experts. In-house global tax experts and Big 4 alliances ensure that no tax issue is too complex for our team.

Local tax specialists. Our network of local tax specialists stretches across the globe, providing in-depth knowledge of jurisdictional regimes.

Continuous updates. The logic driving our solutions is updated and maintained regularly to ensure relief at source and tax reclaims reflect the most current tax treaties.

Complementary solutions. Additional solutions from S&P Global Market Intelligence such as S Corporate Actions services and Global Withholding and Relief at Source enhance your offerings and deliver even more value to your clients.

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