

Tax Solutions: Global Tax Reclaims

Extend valuable reclaim and recovery services to your clients with this managed service solution from S&P Global Market Intelligence.

Financial institutions that pursue tax reclaims on behalf of their clients deliver a valued service that demonstrates a deep commitment to fiduciary obligations. The time and effort required to successfully recover these funds has discouraged many banks and custodians from offering this service to a global clientele with diversified holdings.

S&P Global Market Intelligence's Global Tax Reclaims enables any service provider, including financial intermediaries, brokers, custodians, investment managers, hedge funds, corporations, and pension funds, to extend tax reclaim services to their clients without assuming the operational burden. A team of leading tax experts and local tax specialists manage the process of reclaiming funds on behalf of the beneficial owners from start to finish while providing a single dashboard to monitor the lifecycle and status of the reclaim.

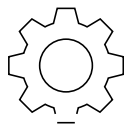
- Consolidate reclaims across 44+ tax regimes with a single provider.
- Gain access to a global network of local tax specialists.
- Tap into the tax subject-matter expertise of S&P and local tax experts.
- Enhance your brand with a fully white-labeled managed service.
- Monitor progress on tax reclaims within a single dashboard.

Key Stats

46 +
Reclaim Markets covered

40 +
jurisdictions covered for Relief at Source

100 +
years of Section 1441 and AEOL experience



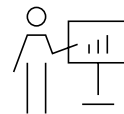
Local reclaim expertise

Our global network of tax specialists are well versed in multiple tax regimes, including FATCA and CRS, and can liaise with local authorities on your clients' behalf.



Continuous updates

Our team monitors local jurisdictional tax changes and withholding rates on an ongoing basis to ensure reclaim accuracy.

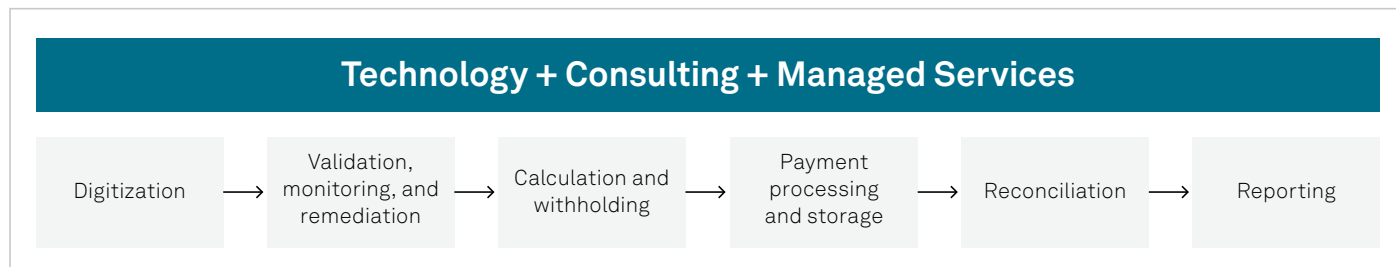


Real-time dashboards

An integrated dashboard provides a window into withholding rates, documentation, reclaim status, and other key performance indicators.

An end-to-end tax solution ecosystem

Our Global Tax Reclaims managed service solution 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 to streamline tax compliance processes and scale operations from end to end — all within a single platform.



Why choose Global Tax Solutions?

When you choose Global 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 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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