

## **Key Points to Note**

**Before you log into the eDocs portal you will need to know your Tax ID Number.**

### **What is a Tax ID Number?**

Most countries provide their residents with a Unique Tax Identification Number. If you do not have a Tax ID number or don't know what your Tax ID Number is then we would ask that you provide an equivalent Unique Identification Number which has been issued by a governmental authority in your country e.g. Social Security Number, or Passport Number.

Alternatively if you have a Certificate of Residency issued by your Tax Authority please leave the Tax ID Number blank and send a copy of your Certificate of Residency to us together with the other documents created by eDocs.

## Key Points to Note

The main screen has three columns. They are:

1. Beneficial Owner information (you),
2. Accounts information (your main Global Trading, LTD account) and
3. Contact Information (how we can communicate with you).

The following notes are to help you complete the page more easily.

**Note: For full site functionality your popup blocker should be turned off.**

### Beneficial Owner Information

- To create a new transaction, click Start A New Transaction and click

**Let's Begin**

eDocs powered by **GLOBETAX**

GLOBAL TRADING, Ltd

User Name:

**START A NEW TRANSACTION** VIEW PAST TRANSACTIONS SEND EMAIL FOR PAST TRANSACTIONS CHANGE PASSWORD LOG OUT

Welcome to eDocs, Global Trading's online document creation tool. Global Trading has engaged GlobeTax to assist its clients with tax reclamation services. eDocs will assist you to complete the forms required for GlobeTax to file tax reclaims on your behalf.

To begin, select "[Start a New Transaction](#)" and complete the information requested, either by manual entry or by uploading an Excel file in the format provided. The appropriate documents will be automatically generated. You will then be able to email them to yourself and/or your clients, as well as view them on the "View Past Transactions" screen.

Please direct any questions regarding these forms to the Client Services department at GlobeTax. You may also contact your Global Trading Relationship Manager with questions.

[View the User Guide](#)

[View Terms and Conditions](#)

**GlobeTax Contact Information:**  
[CS\\_GlobalTrading@GlobeTax.com](mailto:CS_GlobalTrading@GlobeTax.com)

Telephone: +1-212-747-9100  
Globe Tax Services, Inc.  
One New York Plaza, 34th Floor  
New York, New York 10004-1936  
United States

Click the button below to start the process:

**Let's Begin**

Log Out

- Populate the beneficial owner details form.

## Accounts Information

- You only need to enter your main Global Trading, LTD account number.

You will be prompted to add additional account numbers upon clicking "Next >>".

Account Number:  \* 

Date Of Inception:  \*  (MM/DD/YYYY) 


- If you do not know the date of inception, enter today's date.


## Contact Information

- Click "Yes" on the Contact Information Screen to have your name and email address populated in this section. Add your country and telephone number.



Is this the primary contact for this set of documents?  Yes  No \*


**eDocs User**  
**eDocsUser@globetax.com**

Name:  \* 

Email:  \* 

Title:

Country:   

Phone:  \*  Ext:

When you have finished inputting your information and you have saved it, click  at the bottom of the screen.



Please confirm the information on this page. To make changes to the data, click "Edit", if no changes are required, click "Continue".

[Edit](#) **Beneficial Owner Information**

eDocs User  
Individual  
123-45-6789  
Does the custodian have trustee/fiduciary capabilities to sign the GlobeTax account opening documents? Yes  
Client ID: 12345678  
13 March 1980  
  
**Address**  
1 New York Plaza  
New York  
New York 10004 United States

[Edit](#) **Account Information**

123456578  
7 June 2016

[Edit](#) **Contact Information**

eDocs User  
(212) 747-9100  
eDocsUser@globetax.com  
United States

**Continue**