

**GlobeTax provides tax reclaim services for financial institutions and their investor clients. Certain documentation is necessary to file tax reclaims. This documentation varies by beneficial owner type. eDocs will guide you through the process of creating the documents necessary for each beneficial owner.**

**This is a summary of the eDocs system. A user login guide follows.**

What is eDocs?

- **eDocs is an online account opening and document creation program, powered by GlobeTax, which allows our clients to log into a secure portal and submit beneficial owner information and manage document creation and delivery.**

What can I do in eDocs?

- **You can use eDocs to enter beneficial owner data either manually or by uploading an excel spreadsheet.**
- **The system will then use the information you have entered to populate the appropriate documents for each beneficial owner type.**
- **Once documents are created, you can choose to store them or e-mail them directly to yourself or your client for execution.**

How does it help me?

- **eDocs is a simple, efficient way to transfer sensitive beneficial owner data.**
- **eDocs is designed to streamline the account opening and documentation process. The system also makes it easier to submit data on behalf of multiple beneficial owners.**
- **eDocs will notify you of errors made when entering account information (such as leaving a necessary field blank or listing a non-physical address).**
- **eDocs allows you to view previously created documents and check their status.**

Will my data be protected?

- **GlobeTax treats beneficial owner data with the utmost sensitivity. We understand the importance of the security of your information and have created a secure uplink for this data, protected by a Symantec certified SSL with a minimum of 128-Bit encryption.**
- **To ensure security of beneficial owner information, users and managers will be required to change their password every 6 months (180 days).**

If you have any questions about eDocs, please contact: [ClientServices@GlobeTax.com](mailto:ClientServices@GlobeTax.com)

# eDocs User Login Instructions

Step 1 - <https://eDocs.GlobeTax.com>

Or from your internet browser, go to [www.GlobeTax.com](http://www.GlobeTax.com) and go to eDocs found under the Login tab.

## Step 2 – Enter Your User Name

Type in your *User Name*

Click **Continue**



### USER LOGIN

A dark blue rectangular form titled "USER LOGIN". It contains a white input field labeled "User Name" with a red arrow pointing to it from the right. Below the input field is a white "Continue" button circled in red. Underneath the button are two links: "Forgot your password?" and "View Login Instructions".

GlobeTax | One New York Plaza, 34<sup>th</sup> Floor | New York, NY 10004 | T +1 212-747-9100 | F +1 212-747-0029

### NOTE:

If this is your first time logging in, you will be asked to change your password after you log in.

If you have forgotten your password, please click on the link [Forgot your password?](#) Enter your *User Name* and click send password. A temporary password will be emailed to you. You will be asked to change the password next time you log in.

### Step 3 – Enter Your Password

Type in your *Password*.

Click **Log In**.



#### USER LOGIN

Please provide your password, then click 'Login'. You will be prompted to set up your security features.

A dark blue login form. It has two input fields: 'User Name' with the text 'wtcuser' and 'Password' which is empty. Below the fields is a 'Log In' button circled in red. There are also links for 'Forgot your password?' and 'View Login Instructions'. A red arrow points to the password field.

## Step 4 – Change Your Password

Type in the password you have been provided with, and then create a new password.

Click



User Name:

[START A NEW TRANSACTION](#) [VIEW PAST TRANSACTIONS](#) [SEND EMAIL FOR PAST TRANSACTIONS](#) [CHANGE PASSWORD](#) [LOG OUT](#)

Please Change Password

User Name:

Current Password:

New Password:

Re-Type New Password:

Your password must contain 8 - 20 alphanumeric characters with at least one lower case letter, one upper case letter, one number, and one special character. The special characters are: @\$!%\*?&

## Step 5 – Set Up Login Image

Select an image category from the dropdown menu. Then, select an image by clicking on it.

Enter an image caption which is personal and meaningful to you.

Every time you log in to eDocs, you will see your selected image and image caption appear.

If you are on a public computer—as in, a computer other people have access to, click the checkbox next to “This is a Public Computer. Do not Register it”. Otherwise, select “This is a Personal Computer. Register it”.



### Set Up Login Image

Select one of the images from the image library to be your Login Image. Once you have selected your Login Image, on subsequent logins to the system your Login Image will be displayed on the login page. This personal Login Image enables you to validate the authenticity of our site.

Select an Image: \*

Fruits



Choose an image caption that is personal and meaningful to you.

Your Image Caption:

By registering the computer you are currently using, you allow our system to remember the computer. If you register this computer, you will not be asked the security questions the next time you login.

Select one of the following:

- This is a Personal Computer. Register it.
- This is a Public Computer. Do not Register it.

Please select your login Image.