EY Global Tax Reporting Services

FATCA and CRS compliance poses inherent complexities with evolving requirements and an overwhelming data management burden. We can assist with meeting your FATCA and CRS obligations efficiently and sustainably, all while optimizing costs.

Why GTRS?

Building a better

working world



Market leading technology

Our tax technical tools have been deemed the benchmark of technology in the marketplace. Our tools manage and display data in an easy and digestible format.



Tax knowledge

Our tax professionals utilize extensive CRS/FATCA experience and knowledge to accelerate delivery for our clients.



Global footprint

Global network of tax professionals work seamlessly to support clients in more than 75 jurisdictions.



Our onshore and offshore delivery centers provide 24-hour delivery.

The approach

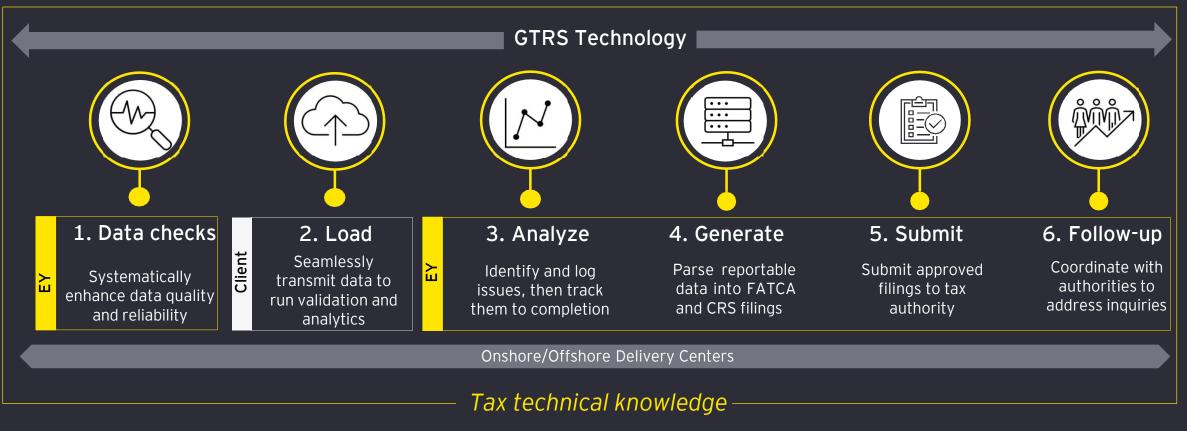
Leveraging our advanced technology and integrated reporting tools, our Global Tax Reporting Services (GTRS) offer a comprehensive approach aimed at streamlining your operational processes. We focus on improving data quality and compliance with dynamic global tax reporting standards, alleviating concerns about operational risks.

GTRS offers key activities to streamline the reporting process, giving you the flexibility to decide your level of involvement or delegate everything to EY team.

- 1. Registration, data sourcing and processing
 - ► FI registration with authorities
 - Source, aggregate and prepare data for upload to GTRS import format
 - Review data quality
 - Import data into reporting tool
 - Create XML schema for review and approval

2. Implementing schema and submission requirement changes

- Monitoring local jurisdiction updates to reporting requirements, including:
 - Reporting deadlines
 - Schema changes
 - Submission process
 - Investor notification requirements



3. Report submission, tax monitoring and change management

- Encryption of XML file in preparation for submission
- Submission assistance and support of XML to competent authorities
- Documented trail of our activities
- Post-submission validation
- Ongoing tax alerts associate to regulatory changes



A look inside

GTRS is a technology enhanced platform that allows financial institutions to report sensitive customer information to tax authorities across impacted countries to comply with FATCA and CRS in a cost-efficient, controllable and sustainable way. We work with clients to customize based on internal and external requirements.

EY support

- Multiple data checks, including, year-over-year comparison
- Assist client with questions and assessing operational impact of regulatory changes

- Status reporting of EY work through standard dashboard and escalation
- Regular status calls and reports

Year-over-year comparison

Streamlines the review and approval process for your team by efficiently spotlighting changes between consecutive years and bringing attention to any discrepancies. Minimize the time required for a comprehensive review, allowing your team to focus on understanding modifications and helping ensure data accuracy.



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EY | Building a better working world

EY exists to build a better working world, helping to create long-term value for clients, people and society and build trust in the capital markets. Enabled by data and technology, diverse EY teams in over 150 countries provide trust through assurance and help clients grow, transform and operate. Working across assurance, consulting, law, strategy, tax and transactions, EY teams ask better questions to find new answers for the complex issues facing our world today. EY refers to the global organization, and may refer to one or more, of the member firms of Ernst & Young Global Limited, each of which is a separate legal entity. Ernst & Young Global Limited, a UK company limited by guarantee, does not provide services to clients. Information about how EY collects and uses personal data and a description of the rights individuals have under data protection legislation are available via ey.com/privacy. EY member firms do not practice law where prohibited by local laws. For more information about our organization, please visit ey.com. Ernst & Young LLP is a client-serving member firm of Ernst & Young Global Limited operating in the US. © 2025 Ernst & Young LLP. All Rights Reserved. 2501-11455-CS This material has been prepared for general informational purposes only and is not intended to be relied upon as accounting, tax, legal or other professional advice. Please refer to your advisors for specific advice. ey.com

Contact us



ara Ferris

Partner Ernst & Young LLP



ri Benjamin

Partner Ernst & Young LLP uri.benjamin@ey.com



Andrea Garcia Castelao

Partner Ernst & Young LLP ndrea.garcia.castelao@ey.com



David Jensen

Partner Ernst & Young LLP avid.jensen@ey.com