



# Currency Transfer Case Study

## Clients Sending Funds to Family

Your clients rely on your guidance in financial matters and are receptive when you make recommendations for specialist services – like international currency transfers.

We've seen some extreme currency volatility over the last few years, and you may have noticed an increasing number of clients making you aware of funds they hold, payments they are due to receive or purchases they wish to make in a different currency.

As your recommended currency provider, we can help your clients make their money go further with:

- Excellent exchange rates
- No transfer fees
- Personal account management
- Flexible transfer solutions
- Expert insights

### About us

- Established 2004
- 500+ Employees
- 325,000+ clients
- 20+ global offices
- Level 1 Credit Rating

## Case study

A financial advisor's daughter was moving to the Netherlands for three years to study.

He needed a simple, secure way to send his daughter money to cover her rent and general living costs.

He planned to send a set amount overseas on a monthly basis, and transfer his daughter ad hoc amounts as and when she needed additional funds.

### Our solution

The advisor created an account with TorFX and set up a regular overseas payment to his daughter's landlord to cover her rental payments. The payments were automated, so he could be confident that the funds would arrive on a set date without him having to do a thing.

He also downloaded the TorFX app.

With the app he was able to check live exchange rates on-the-go and move money to his daughter's account in the Netherlands in just a couple of taps.

He also used the app to check live exchange rates so he could move his money at the right time.

Contact our Partnership Team to find out more about referring your clients to TorFX

Call: **+44 (0)1736 335740** E-mail: **partners@torfx.com**