



# Currency Transfer Case Study

## Clients Transferring a Pension Overseas

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

Mr Smith's pensions are paid into his UK bank account, and (until recently) he was using his bank to transfer the funds to his account in Australia.

However, his bank converted the funds at an uncompetitive exchange rate and applied transfer fees, eating into the amount Mr Smith received.

### Our solution

After being referred to TorFX, Mr Smith quickly opened an account.

He now has the option to log into his online account to check live rates and make 24/7 currency transfers or arrange his transfers over the phone with his account manager.

Additionally, Mr Smith discovered that he could get an even better exchange rate on larger transfer amounts, so he decided to make his transfers on a quarterly basis rather than monthly.

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

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