



Currency Transfer Case Study

Clients with Businesses

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

By referring your clients to us you'll be introducing them to a value-added service while receiving a referral fee for making the introduction.

About us

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

Case study

An adviser was conducting a review with their private client and asked them if they ever handle different currencies.

The client mentioned that they also owned a business that buys stock from European manufacturers in Euros.

They have one or more invoices of varied amounts to pay per month and every time they made these payments through their bank they were being charged a £10 transfer fee.

The adviser mentioned that TorFX doesn't apply a transfer fee, and would also be able to help them secure a more competitive exchange rate.

Our solution

The client asked to be introduced to TorFX so the adviser referred them through the Partners Portal.

TorFX contacted the client and discussed their requirements.

The client created a no-obligation business account with TorFX, giving them the ability to check live exchange rates 24/7.

Whenever the client has a requirement they either contact their dedicated account manager to discuss the latest market movements or log into their business account to secure rates as they move in their favour.

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

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