



Currency Transfer Case Study

Clients Working 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

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

During a review an adviser learned that their client was going to start working overseas and would be paid in US Dollars.

The adviser asked the client how they planned to transfer their wages back to their UK bank account.

At the time the client had provided their UK bank account details to their employer, however the adviser explained that when their employer sends the US Dollar to their UK bank account the bank will apply their own rate of exchange, which could leave them out of pocket.

The adviser suggested speaking with TorFX as their excellent exchange rates could help them achieve more from their salary payments.

Our solution

The adviser referred the client through their Partners Portal and TorFX made contact with the client.

The client created an account with TorFX and gave their US Dollar account details to their employer.

TorFX receive the client's salary payments every month and the client works with their dedicated account manager to choose the best time to transfer into GBP.

This solution gives the client more control over their finances and ensures they get a better return on their salary payments.

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

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