



# Currency Transfer Case Study

## Clients with International Investments

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

A client spoke to her financial adviser about the US company shares she inherited from her late husband. Every year she receives annual dividends in US Dollars.

When the USD are sent to her GBP account the client is left out of pocket because the sender's bank apply their own rate of exchange.

The client approached their financial adviser to see if they knew how she could receive more of the dividend payments instead of the bank eating away at it with their charges..

### Our solution

The financial adviser spoke to their Partnership Manager at TorFX who explained how their services would benefit his client's situation.

The advisor referred the client and they were contacted by their dedicated TorFX account manager within 20 minutes. The client discussed their requirements and opened an account within minutes.

Once registered the client was provided with TorFX USD account details, which she shared with the dividend provider.

When the USD was sent to TorFX it was converted to GBP at an excellent exchange rate and transferred to the client's GBP account.

This solution helped the client gain greater control over their finances and see an improved return on their dividends.

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

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