



# Currency Transfer Case Study

## Clients with Overseas Inheritance

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 made their financial adviser aware that they were due to receive a €54,000 inheritance from The Netherlands.

They were planning to instruct the sender to remit the funds directly into their GBP bank account, but their advisor suggested that they have a quick chat with TorFX first to determine how much more GBP they could receive by getting us to do the conversion.

### Our solution

After an initial chat with the team, the client registered with TorFX the same day.

We provided them with our EUR account details and a payment reference code.

The client instructed the solicitors to send the inheritance to TorFX and asked their account manager to keep them updated with the latest exchange rate movements.

When the funds arrived the client waited a few days for the exchange rate to improve before making their transfer and we sent the GBP to the client's account.

**Note** - *the transfer process is the same when legal firms register with TorFX to send funds to heirs.*

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

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