



# Currency Transfer Case Study

## Clients Selling Property Abroad

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

Adam began planning his move back to the UK in August 2019, with his Spanish property estimated to sell for around €300,000.

With the EUR/GBP exchange rate at a high of £0.93, Adam predicted he would have around £279,000 once he transferred his funds back to the UK.

However due to a number of prospective buyers pulling out at the last minute, he was unable to sell his property until December, at which point the EUR/GBP exchange rate had fallen to €0.83, resulting in his transfer only being worth £249,000.

### Our solution

Fortunately, Adam opened an account with us in August and used a forward contract to fix the exchange rate.

By fixing the exchange rate in advance of making his transfer he was protected from the sudden dip and ended up around £30,000 better off than if he'd made his transfer at the lower rate.

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

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