MERCHANT WEST
TREASURY SOLUTIONS



# MONEY TRANSFERS
## FOR CLIENTS OF IFA'S

We know how hard you, as an Independent Financial Advisor, work to both attract and retain clients and provide the best advice. We also appreciate that any third-party recommendation we receive is based on research, trust and transparency.

**As such we guarantee:**

- 100% transparency in our dealings.
- To not cross sell or contact your clients other than in the business of foreign exchange.
- To continue to innovate and search for services and improvements that assist you and your clients.
- To provide a service that exceeds yours and your clients' expectations.

**Merchant West Treasury Solutions works with IFA's who in turn advise their clients on offshore investments.**

**We offer individual clients peace of mind with:**

- Transparency on charges – there are no hidden fees or surprises.
- International certification for both security and service levels.
- A nationwide footprint of consultants providing first class support and advice.
- A full suite of foreign exchange services – not just money transfers.
- An unrivalled reputation with financial services providers.

**An added advantage to dealing with us is convenience where:**

- There is no need to continue shopping around or checking that your clients are benefitting from competitive exchange rates.
- There are no inconsistencies with quoted exchange rates and the actual rate received.
- You get help in mitigating fluctuations in exchange rates.
- The exposure of your clients to unwanted canvassing and data sharing is stopped.
- Compliance issues that may arise from recommending a third party to your clients are addressed.
- The arduous process of opening offshore bank accounts is removed.
- You, as the advisor, will be able to access all data concerning your clients' international transfers.

Merchant West Treasury Solutions Pty Ltd is an authorised financial services provider, with FSP 13011 and a South African Reserve Bank approved intermediary.

# Merchant West Treasury Solutions



Peace of mind in dealing with an  ISO 9001 and 27001 accredited intermediary – the annual awarding of this meaning not just peace of mind in regard to our service and security levels, but also documentary due diligence for compliance purposes as a third party provider.

**Our guarantee to you:**
At Merchant West Treasury Solutions, we know how hard you, as an advisor, work to both attract and retain a client and provide the best advice. We appreciate that any third-party recommendation is based on research, trust and transparency.

**Credentials:**

- Preferred supplier status with most of South Africa's leading investment houses.
- The named supplier on 3 of the top leading investment houses' application forms.
- Currently dealing with in excess of 2000 advisors across South Africa.
- FSCA authorised.
- ISO 9001 and 27001 accredited.

**Did you know?**

Our team of dedicated consultants are available throughout South Africa, as well as a support team in head office – meaning you and your client can access expert advice whenever and wherever best suits.

Our AdvisorHub provides Financial Advisors with the ability to access all their clients' trade and allowance information as well as technical guides and dedicated IFA newsletters – meaning you have all the information you will ever need via our IFA online portal.

**Contact us for your free consultation.**

**Website**: www.merchantwest.co.za/treasury-solutions/
**Tel:** +27 (0) 21 424 2936
**Email:** General@merchantwest.co.za
**Offices in:** Cape Town, Gauteng, Pretoria, KZN, Port Elizabeth and Garden Route.

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