

## ★ REFERENCE GUIDE · PRIVATE CLIENTS

### Investing Offshore



Currency Partners specialises in international payments, delivering intelligent currency solutions to private clients, businesses, and professional partners across South African borders.

#### ABOUT US

As your dedicated currency concierge, we go beyond currency. Whether you are moving money for property abroad, global investments, international suppliers, or your personal legacy, we understand that behind every currency transfer there is a story that matters to you, which is why you are our most valuable currency.

**5,000+**

LOYAL PARTNERSHIPS

**ZAR 100bn+**

TRANSFERS MANAGED

**16+ Yrs**

OF TRUSTED EXPERTISE

#### VALUE FOR YOU

- ★ Preferential exchange rates for significant savings.
- ★ End-to-end offshore annual allowance management.
- ★ Estate and Trust Distributions to offshore beneficiaries.
- ★ Complimentary SARS AIT tax clearance applications.
- ★ FECs to secure favourable market rates in advance.
- ★ Premium interest currency cash management accounts.
- ★ Regulatory SARB Exchange Control compliance.
- ★ Hedging strategies, rate alerts and 24/7 market orders.

#### TRUSTED BY

Investec

momentum  
investments

glacier  
by Sanlam

OLDMUTUAL

ALLAN GRAY

consult.  
by momentum

CORONATION  
TRUST IS EARNED™

PAM GOLDING  
PROPERTIES

Ninety  
One

D G  
PROPERTIES

STBB  
the Big Small Firm

## THE PROCESS OF INVESTING OFFSHORE – SAVE. SEND. INVEST.

### 1 Contact Currency Partners

Engage with us as a specialist foreign exchange provider to discuss your requirements when considering externalising funds under your annual allowances of up to R12 million per calendar year.

### 3 Prepare for your annual allowances

Request a complimentary AIT foreign Tax Clearance from SARS, if needed, for your annual Foreign Capital Allowance (FCA) of up to R10 million per calendar year, or for special approval on amounts greater than this.

### 2 Register and apply

If you do not yet have a currency account with Currency Partners, simply register online and apply to benefit from premium interest rates and significant exchange rate savings.

### 4 Buy your currency and invest

Contact your dedicated Personal Dealer to secure your preferential exchange rate and tell us where to send your purchased currency. Save. Send. Invest.

#### INDIVIDUAL OFFSHORE ALLOWANCE

# R12 million

per calendar year · 1 Jan — 31 Dec

#### ★ Who qualifies

South African residents over the age of 18 who have a South African ID and income tax number. Amounts exceeding **R12 million** can be externalised with special clearance.

## WHY CHOOSE CURRENCY PARTNERS

As the preferred partners for leading Wealth Managers, Attorneys, and Estate Agents, we give you access to the best pricing and service available in the market.

By delivering more value to you, we ensure that you get more for your money and that your margins matter. Through a combination of digital efficiency and a premium client centric approach, we save you time and money on your currency.

#### ★ Digital efficiency. Premium personal service.

Life is busy, moving your money should be easy — our expert team handles it all with precision and care.

## HOW IT WORKS

### ★ STEP 1

#### Register

Complete our short online registration and send us your supporting documents.

### ★ STEP 2

#### Fund your account

Fund your client account and we will contact you to discuss your requirements.

### ★ STEP 3

#### Buy currency

Receive a highly competitive quote to buy your currency and save.

## Ready to invest offshore?

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**Speak to an expert**