

Foreign Exchange Services





INTRODUCING ECHELON WEALTH PARTNERS

Echelon Wealth Partners is an award-winning financial firm that specializes in providing customized financial solutions to businesses and high-net-worth individuals. Our team has been recognized for our expertise in foreign exchange services and our commitment to providing exceptional service to our clients. We are dedicated to helping business owners navigate the complex world of foreign exchange and achieve their financial goals.

Challenges Business Owners Face

As a business owner, you understand the importance of managing risk and maximizing profitability. In today's global economy, managing foreign exchange risk is an essential part of running a successful business. Echelon Wealth Partners offers a suite of foreign exchange services designed specifically for business owners like you. Our team of experienced professionals has in-depth knowledge of global markets and can provide you with valuable insights and advice.

Managing foreign exchange risk can be challenging, especially for businesses that operate in multiple countries or engage in cross-border transactions. The fluctuation of exchange rates can have a significant impact on profitability, and businesses need to have a plan in place to manage this risk. Echelon Wealth Partners can help business owners navigate these challenges and develop a comprehensive strategy to manage foreign exchange risk.

SPOT BUSINESS

90 BN

SWAPS

60 BN

LARGE OPTION STRUCTURES

100'S

Echelon Wealth Partners offers a wide range of foreign exchange services designed to meet the unique needs of business owners. Our services include:

Currency Conversion: We offer competitive rates for converting currencies, allowing businesses to manage their international transactions efficiently.

Hedging Strategies: Our team can develop hedging strategies to manage foreign exchange risk and protect against currency fluctuations.

Risk Management: We can help businesses identify and manage foreign exchange risk through the use of risk management tools.

Echelon currently trades the following currencies:





»»» CASE STUDY

ECHELON
WEALTH PARTNERS

THE PROBLEM

- Lacked the ability to forecast accounts receivable (GBP)
- Without reliable projections of accounts receivable, management was unable to confidently plan for future capital expenditure.

THE SOLUTION

Through working with Echelon's foreign exchange team, the company was able to implement a strategy of selling forward contracts, at a much lower cost than what the company was originally quoted.

The company is now able to accurately forecast working capital requirements, providing more stability to the company's cash flows and providing management with confident projections to make future capital allocation decisions.

Client

The company operated an import/export business mainly dealing with customers in England. The business lacked the ability to forecast revenues since clients were permitted to pay at a later date.

This presented a problem with respect to the business's ability to properly manage cash and wanted a plan to minimize the fluctuations caused by spot rate volatility.

BENEFIT

+\$1,000,000 annually

Meet the Team



JOHN RICE

Over 40 years in Capital Markets with a focus on Fixed Income and Syndication



LUKAS FRANKOWSKI

Lukas has over 17 years of experience in Capital Markets, previous roles in fixed income and equity trading have developed a great understanding of market dynamics. Lukas previously worked at Dundee Capital Markets before joining Echelon Wealth Partners. Lukas has received a BA from York University in Economics and Statistics.



J.D RICE

Over 4 years of experience with Echelon Wealth Partners specializing in Foreign Exchange, Fixed Income and Money Market Trading

If you're a business owner looking to manage foreign exchange risk and achieve your financial goals, contact Echelon Wealth Partners today. Our team of experts can develop a customized strategy to meet your unique needs and help you navigate the complex world of foreign exchange. Contact us today to learn more or to schedule a consultation.

