SKYBOUND
WEALTH MANAGEMENT

Working Together

“

Your Global Partner In Building And Maintaining Wealth

”

Our Focus Is...

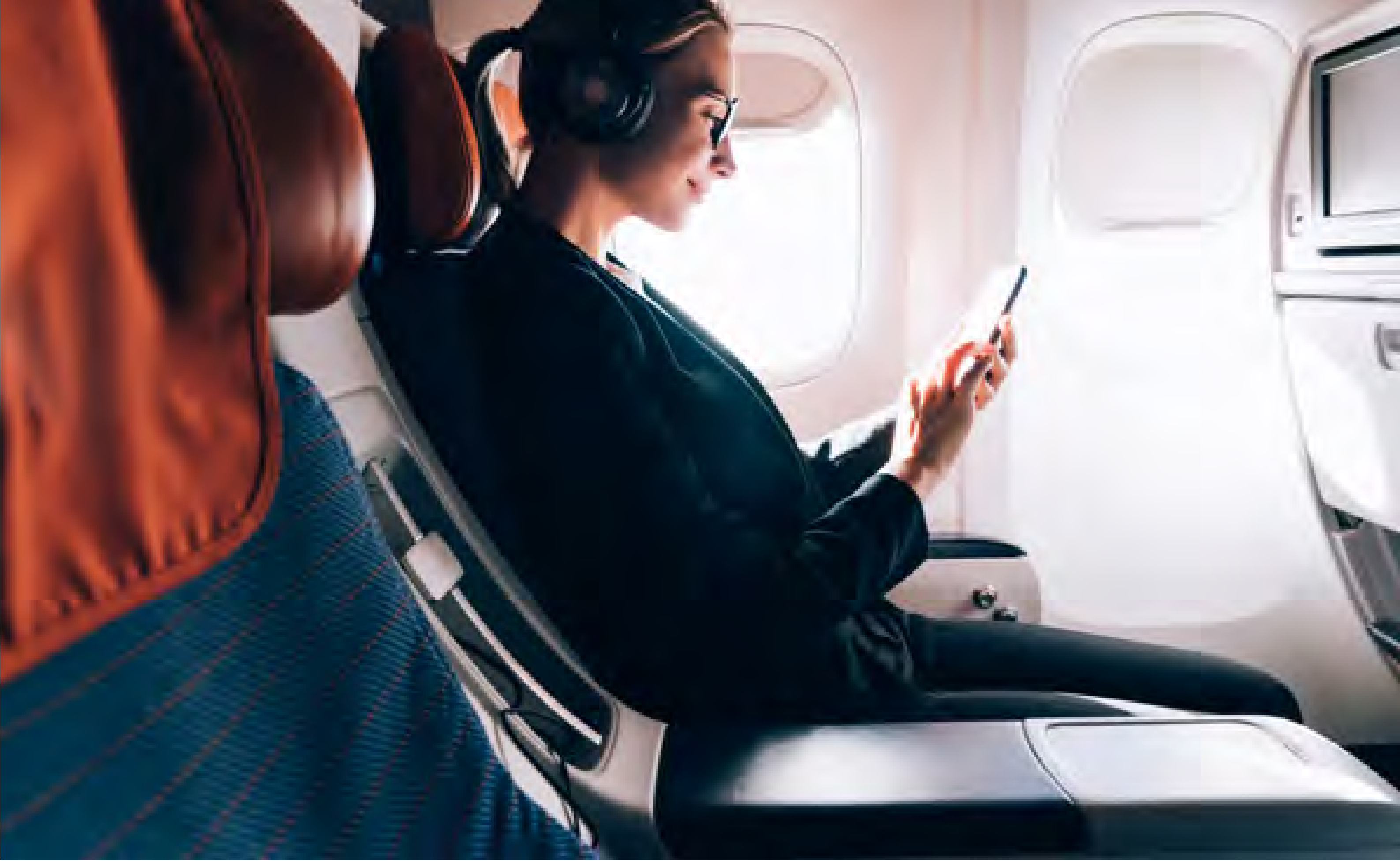
You through rain & shine

Welcome to Skybound Wealth Management

Skybound Wealth Management have been providing lifestyle financial planning to clients around the globe for almost 20 years. From modest beginnings, Skybound has grown to become one of the world's leading providers of international lifestyle financial planning. Skybound look after over 10,000 international clients, managing over $1billion of client savings.

The focus of our business is you. Everything we do is aimed at helping you manage your wealth, to enjoy life and provide the future you and your loved ones dream of.

Our advice is fully regulated with clear and transparent charging structures, full disclosure and a variety of service level agreements to match your individual requirements.



A Service Level That Suits Where You Want To Be

As your partner in building wealth and security, and more importantly maintaining it, we focus on ways that we can help you to plan for the life you want to live. We don't just rely on our own knowledge – we work in partnership with other experts and professionals to deliver to you the best advice and bespoke recommendations to suit your needs. We provide service to you from a team of advisers and administrators designed to be able to answer your queries efficiently and keep you on track to achieve your financial goals.

We understand that your individual financial requirements are unique to you. Because we know that no two sets of situations are the same, rather than trying to make a 'one size fits all' service proposition, as others may do, we have designed our levels of service around your needs.

After a discussion with your Skybound Adviser you can decide what level of ongoing service is right for you based on your current requirements. All our ongoing service packages are completely flexible and, should your circumstances change, we can adjust your service level to suit you.

GLOBAL PARTNERS

Value of Advice...

We Deliver Our Services In Two Parts

Initial consultation & ongoing service.

Your initial consultation includes an in-depth factfinding process and scientific risk profiling on a one to one basis with a qualified adviser who will provide full advice and recommendation including a structure and strategy for your wealth building journey.

The second part is the ongoing service and dependent on where you are with your financial planning goals we have three different partnership agreements for you to chose from.

We believe in clear and transparent charging structures that are relevant to the level of advice needed at outset and the ongoing service you require.

Earn It And Keep It

The Six Stages Of Wealth Planning

Graduate
Low income, low outgoings, enjoying new found financial freedom with little concern for the future.

Mid twenties
Income begins to increase. With aspirations to get on the property ladder, savings begin.

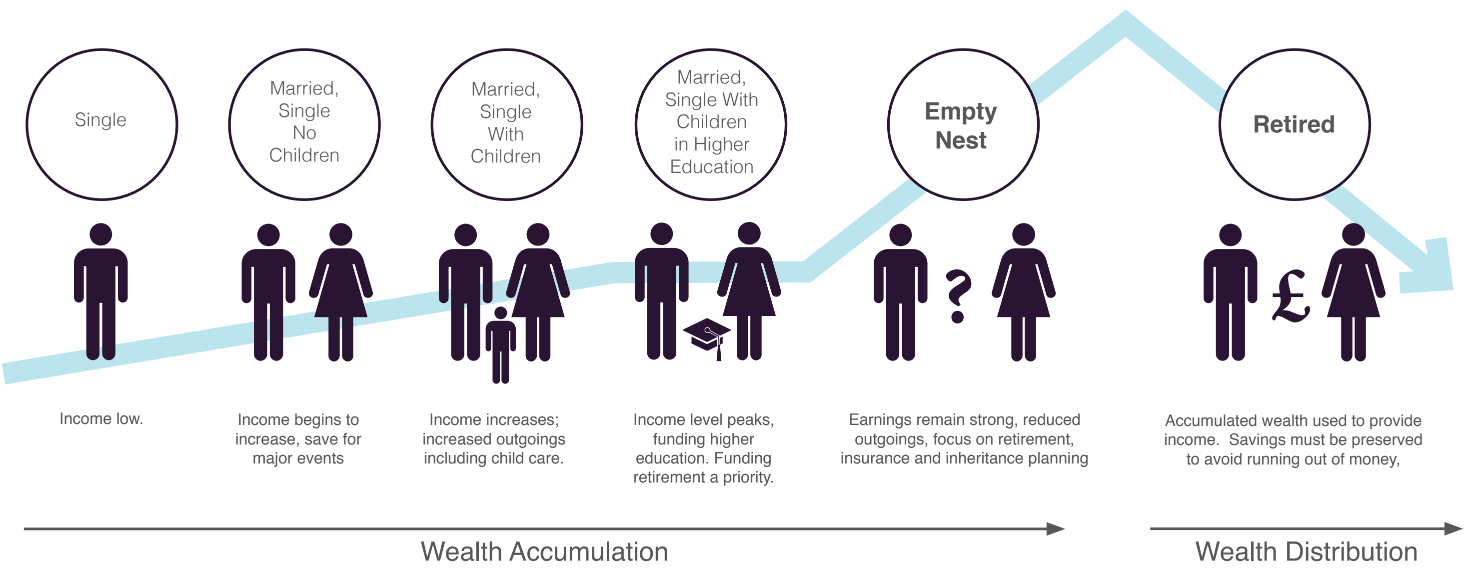
Thirties
Income continues to rise, arrival of children increases outgoings and importance of life insurance for peace of mind should the worst happen.

Forties
Income level peaks, Bank of mum and dad required as children reach higher education. Funding retirement becomes a priority.

Fifties
Earning ability remains strong and reduced outgoings enables rate of wealth accumulation to accelerate. Increased focus on retirement planning and inheritance tax planning should the worst happen.

Retirement
Accumulated wealth used to provide income. Savings must be preserved to avoid running out of money, inheritance tax planning should be considered to protect your estate should the worst happen

We appreciate that wealth planning for individuals doesn't come with a one size fits all solution. However, the chart highlights the key stages of a person's life and how priorities change through one's life.



“

Our Wealth Management Service Is Available. Exceptional Levels Of Support And Service Based On Your Requirements And Financial Criteria

”

SERVICED PARTNER

Inclusive Services

- Initial on-boarding process
- Portfolio construction
- Annual financial review
- Access to Skybound Online Client Portal
- Global client management
- Location transfer service
- Repatriation service
- Access to preferred rates for:
  - FX
  - Mortgages
  - Wills
  - Property
- Support from Skybound Associates
- Pension review by international pension experts
- Invitations to exclusive Skybound and Institutional Seminars

Our Values
Independence through private ownership

Independence

Retaining independence through private ownership, means Skybound works purely in the interests of clients and such independence is the foundation on which Skybound has been built. Being able to choose from the open market enables Skybound to tailor solutions around the client and fund selection via an independent investment committee which underpins the true independence of advice.

Ethical Integrity

Skybound has adopted the principles of UK based financial planning, adhering to 'Treating Customers Fairly (TCF)' policies, UK Data Protection principles and comprehensive and transparent reporting to clients, partners and regulators. Skybound are regulated in all jurisdictions from which they operate and enforces their own internal regulation and compliance functions to exceed and surpass client and regulator expectations.

Professional Development

Skybound rewards those who continually strive to place their clients' interests before their own and take personal responsibility in providing superior advice based on both internal and external qualifications. All planners are required to adopt minimum training standards and are regularly assessed and monitored to ensure complete compliance.

Advice based around trust and exceptional advice

All of our planners are qualified and are encouraged to surpass Level 4 with the aim of Skybound operating more Level 4 qualified planners than any other planning company.

As in the UK, all planners are required to engage in Continuous Professional Development and must demonstrate a current knowledge of legislation in their country of operation.

At Skybound we believe that financial planning is an ongoing process which is why we have developed our Partnership Agreements to address the individual needs of each client.

SKYBOUND
WEALTH MANAGEMENT

SKYBOUND
WEALTH MANAGEMENT

e: globalpartners@skyboundwealth.com
w: www.skyboundwealth.com