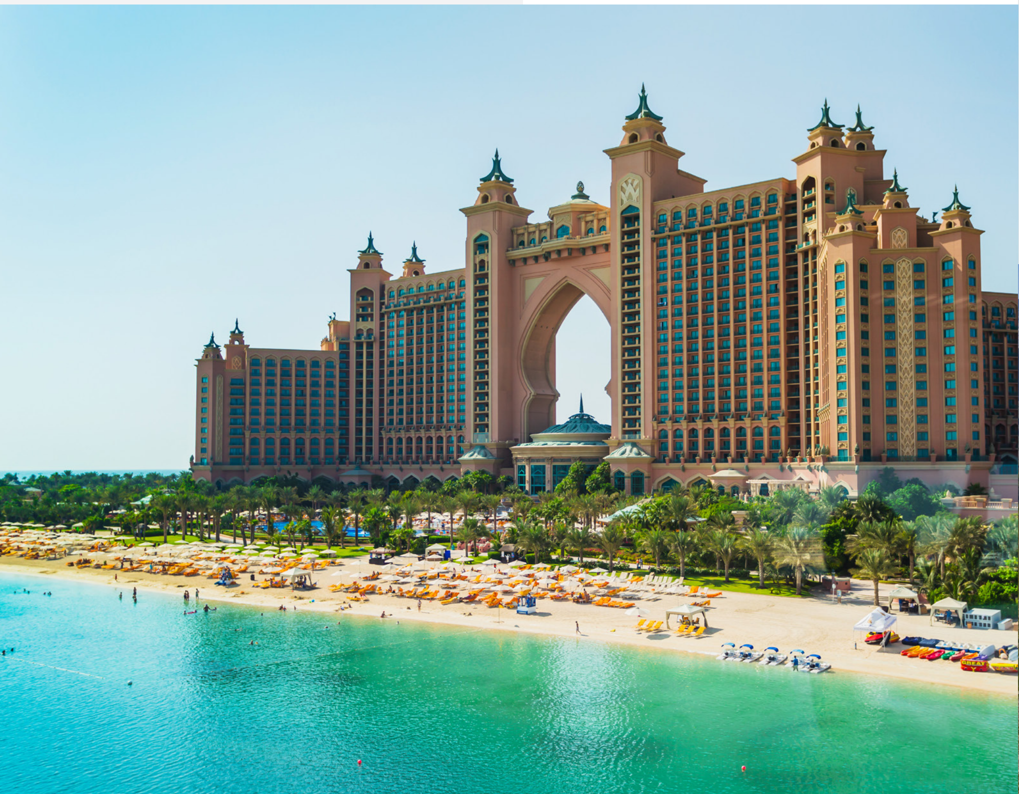
Why Skybound Wealth Management?

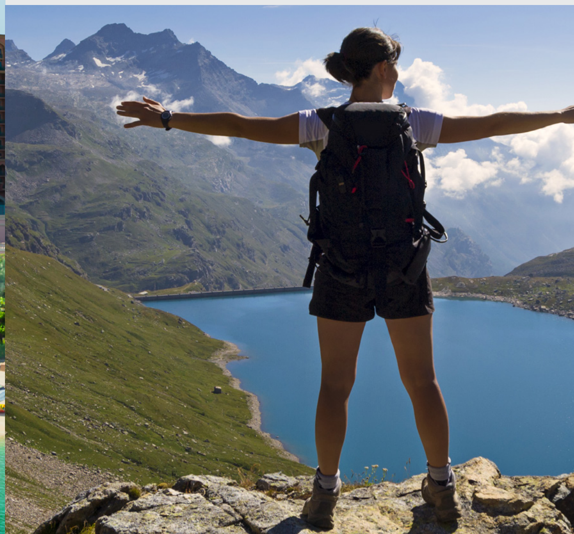
Our Unique Proposition for Financial Planners

SKYBOUND
WEALTH MANAGEMENT

“Since the acquisition, we have focused on understanding the needs of both clients and employees to ensure we build towards and implement the changes required to ensure we look after our two most important stakeholders. Strategically we believe this rebrand is important to distinguish the new era from the previous one.” - Ian Sweet

Ian Sweet
Chief Executive Officer





Regulation

The most important USP for Skybound Wealth is our strong regulatory background in multiple jurisdictions. Following our UK founding in Yorkshire, continuing to broaden our licensing and regulatory framework has driven the development of the firm, whilst allowing us to stay true to our roots.

Across the brand, we hold a number of advice licenses:

- An FCA license in the UK
- An ARIF supervised by FINMA license in Switzerland
- An SEC license in the US
- Both the IA and SCA licenses in the United Arab Emirates
- Coming soon – MiFiD II license in Europe and ASIC in Australia

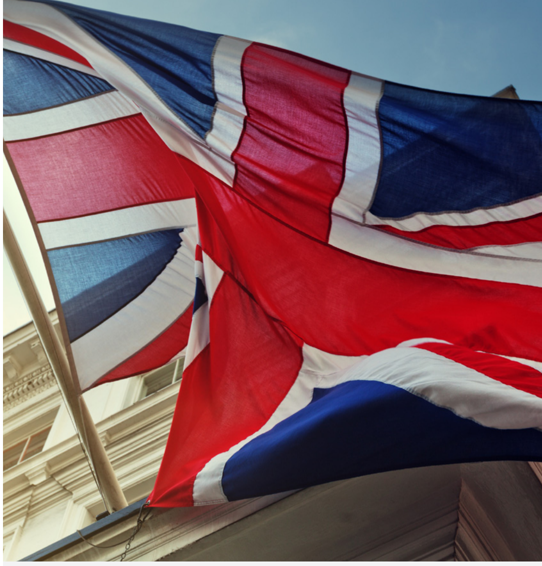
Compliance

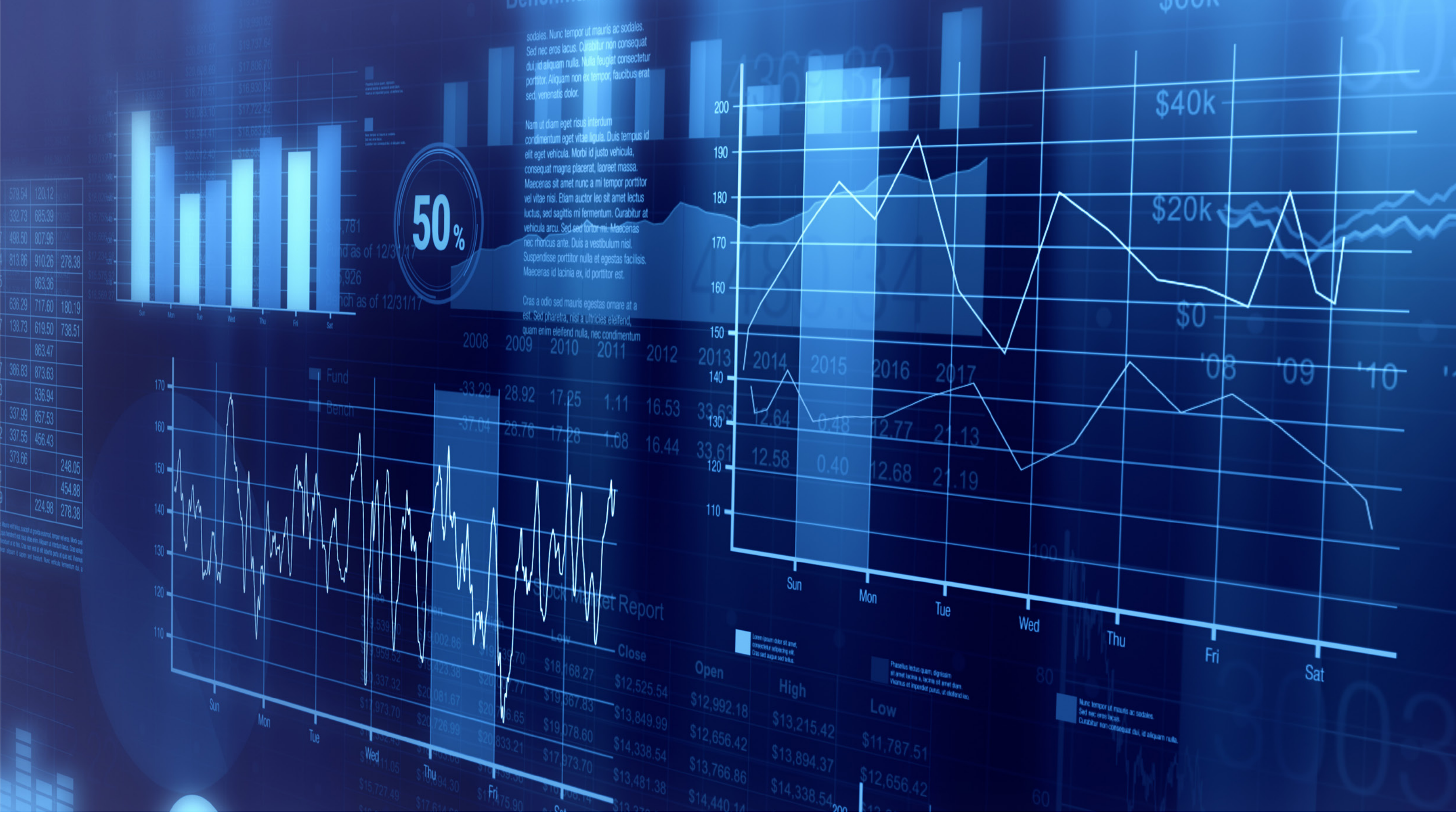
Furthering our strong licensing and client offering is our dedicated internal compliance team, based in the UK and across the regional jurisdictions in which we operate. The due diligence completed by this team ensures we are continuing to develop new terms of business with investment and insurance providers, as well as staying ahead of any regulatory changes e.g. introduction of MIFID II. Notable terms of business additions of late include: additional low-cost offerings, US expatriate solutions and property investment options.

Repatriation

Our UK FCA regulated arm of the business allows fully RDR qualified Financial Planners with international experience to join the UK team and build on their client base. Skybound Wealth recognise the fact that some overseas Financial Planners may want to have a UK base for various reasons, which we can facilitate through CAS training and sign off.

We offer holistic financial advice across all areas of UK planning, but specialise in repatriating our international clients when moving back to the UK. Due to the size of the business we receive regular requests each month, which gives our UK Financial Planners a stream of client AUM to onboard and manage, plus opportunities to generate new business in other areas.





Investment Strategy

Skybound Wealth has developed a brand new, industry-leading investment proposition to deliver to our clients worldwide. The Group Investment Function is carefully designed keeping in mind our vision of being the advisors of choice and holding true to our value of 'commitment to clients'.

Skybound Wealth's, industry-leading investment proposition has been carefully designed to deliver a proposition based on protecting existing wealth and building steady and consistent returns whilst ensuring continuity, detailing improvements, and is positioned to compliment every step of the financial planning process to our clients worldwide.

This strategy, is based on protecting existing wealth and building steady and consistent returns.

Skybound Wealth's investment philosophy is based on four key principles:

- Consistent approach
- Focus on long term growth
- Quality understandable investment
- Maximising returns through diversification

With options available for actively managed, passive, and low-cost offerings, we can meet a variety of client demands. The investment committee review our models regularly to ensure we are responding to global economic and political events appropriately. What is great to see is how we compare to the rest of the market – client returns in our model portfolios have been over and above those achieved by some of the most prominent UK investment managers, with lower volatility and reduced cost.

The dedicated investment team means there is significant support for Financial Planners with large investment cases, with members of the team able to attend meetings with clients to run through the portfolio make up. In addition, the investment function provides all staff and clients with weekly market updates, and ad hoc information when significant market movements occur.

Operations and Pipeline Support

Another key benefit of working for Skybound Wealth is the large operations team supporting our Financial Planners globally. Headed up by our Operations Manager, we have administrators in each office handling queries from providers, trustees and clients to ensure the smooth issuance of new advice business.

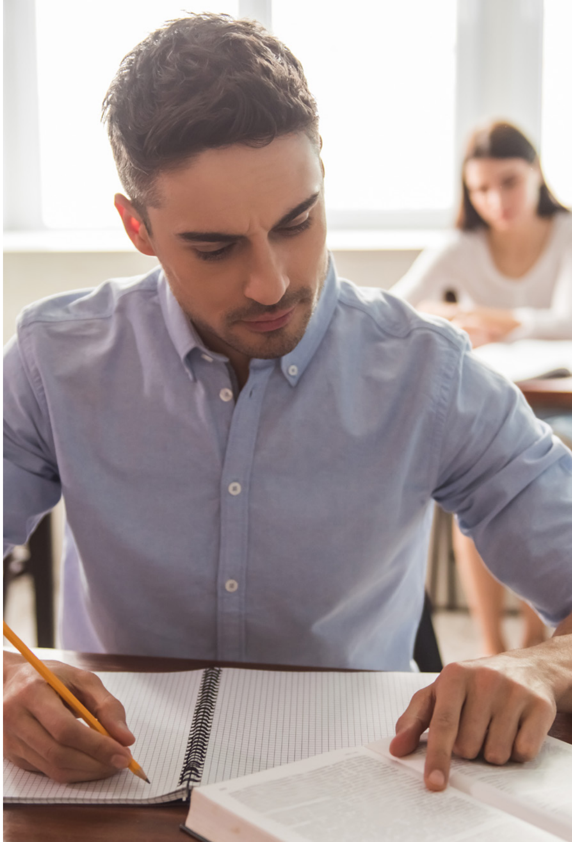
Qualifications

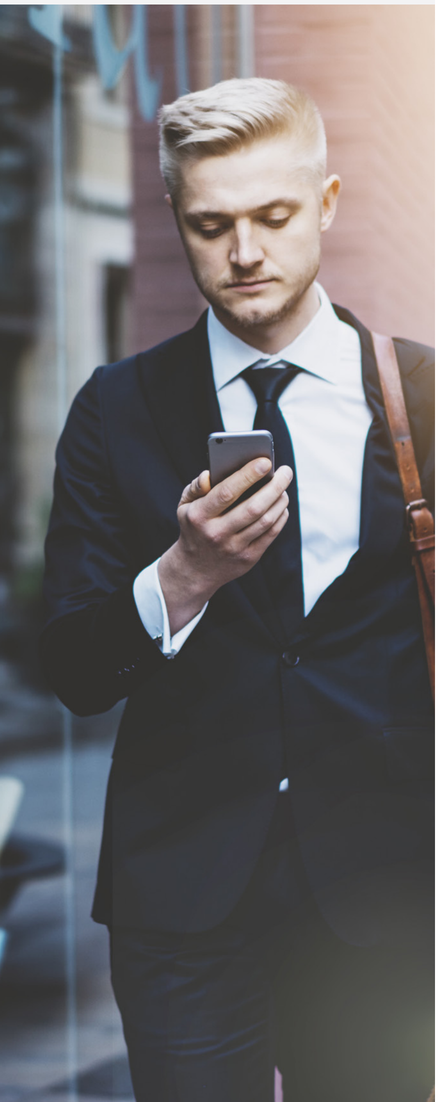
In the summer of 2019 Skybound Wealth adjusted its exam policy to ensure we are supporting our employees as effectively as possible. We now pay for all exams in advance and offer in-house study materials for industry relevant qualifications across CII and CISI exam boards.

This includes the Level 4 Diploma for those wishing to become Financial Planners, as well as advanced level exams e.g. AF7, for our existing advisory team.

Business Development

To support our Financial Planners with developing their client base, we have several dedicated teams in place: we have a team of Associates working from each office, contacting potential new clients and introducing the Skybound Wealth Management proposition to set up a first meeting with a Financial Planner. These individuals are experienced professionals, working through our Apprentice Scheme to become the Financial Planners of the future. Crucially, the salaries for these teams are paid for by Skybound Wealth Management and Financial Planners would not have any fixed costs for the support.





Marketing

Our centralised marketing team run online advertising campaigns and social media accounts to generate new client interest for our Financial Planners in each area. This leads to thousands of inbound client enquiries each year, with many becoming new clients of Skybound Wealth worldwide. In addition, the team create new brochures and content for each region and individual Financial Planners on request. A new team we created in 2018 is our research unit, aiming to proactively identify new international clients across Europe and the Middle East. This additional support for our Financial Planners has led to several thousand new appointments, with a large number becoming new clients.

Support from Skybound Capital

An exciting part of working with Skybound Wealth Management is our support from Skybound Capital. Skybound Capital have been working with us since the start of 2019 and this synergy has created one of the most powerful global financial planning brands in the world. Fusing Skybound Capital's global infrastructure and Skybound Wealth Management's existing proposition enhances our client servicing in existing regions and promotes expansion into new territories in the medium to long-term.

Team Ethos

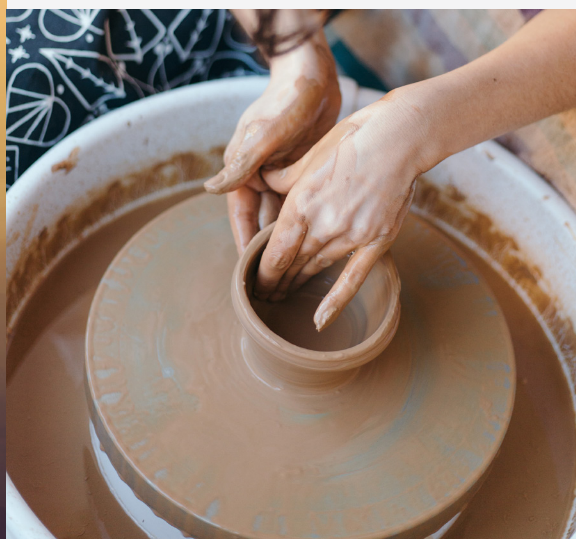
A final, often overlooked, benefit of working for Skybound Wealth is the strong team ethos promoted within the company, all the way from senior management to new starters. Our Financial Planners, Associates, and administrative staff spend a lot of time together, and the sense of camaraderie is a real draw. Take a look at our Twitter, Facebook and Instagram accounts to see for yourself.

Growth Focus

Skybound will continue to focus on growing in its existing regions in 2022. Further afield the group will launch in Europe following the acquisition of a MIFID compliant company in Cyprus. Drawing on the wider Skybound Capital Group footprint, the firm has identified Australia as another target area for the group for later in 2022.

Bound Together

At Skybound we are bound together by a shared vision of becoming the employer of choice and adviser of choice for international professionals. We firmly believe these changes will help us to achieve this ambition. We strive as a collective to not only remain at the forefront of international financial planning, but to lead its evolution.



Securing Your Future.

Wherever You Are Today.

Skybound Wealth Management began in the UK over 20 years ago and today we have offices in many of the world's largest financial centres including; Geneva, Dubai, Abu Dhabi, London and Miami. Skybound Wealth are fully regulated within every jurisdiction in which we operate and are supported by a global services department that are authorised to assist you with financial advice 24/7, wherever you are in the world. This client-centric approach to financial planning provides clients with the certainty that wherever they are, Skybound Wealth are alongside them.

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