




SKYBOUND

WEALTH MANAGEMENT



Securing Your Future.

Wherever You Are Today.

A large, vibrant pink balloon is tied to the back of a white, distressed wooden chair. The chair is positioned in the lower half of the frame, and the balloon floats in the upper half. The background is a smooth, light blue gradient. The text "Don't get tied down by traditional thinking" is centered in the middle of the image, overlaid on the balloon's string.

Don't get tied down
by traditional thinking



Let's fly

An International Wealth
Management Company Built Upon That,
Which Is Most Precious To You.

**The Desire For Freedom
& Benefit.**

Working Together For A Brighter Future

Independent & Award
Winning Financial Planning
Designed With You In Mind.

Combining a wealth of experience, with global coverage and local knowledge, Skybound Wealth Management is a leading international independent Financial Advisory Company which has been providing global client-conscious financial advice for over 20 years.

Bound together by a common goal, our success relies upon the realisation of your dreams. We exist to educate and guide you through the important decisions required today, to ensure you benefit from the freedom that tomorrow brings.

Our senior management team consists of some of the most experienced people within our industry who have all demonstrated a shared passion and desire to be the very best at what they do.

We deliver bespoke financial plans for the immediate future and for the long-term security of you and your family, meaning you can live for today, knowing tomorrow is taken care of.





“

The biggest investment we make isn't into a single stock or share, it's our commitment to helping you realise the future you always dreamed of..

”

Award Winning Personal Advice backed By Cutting Edge Technology

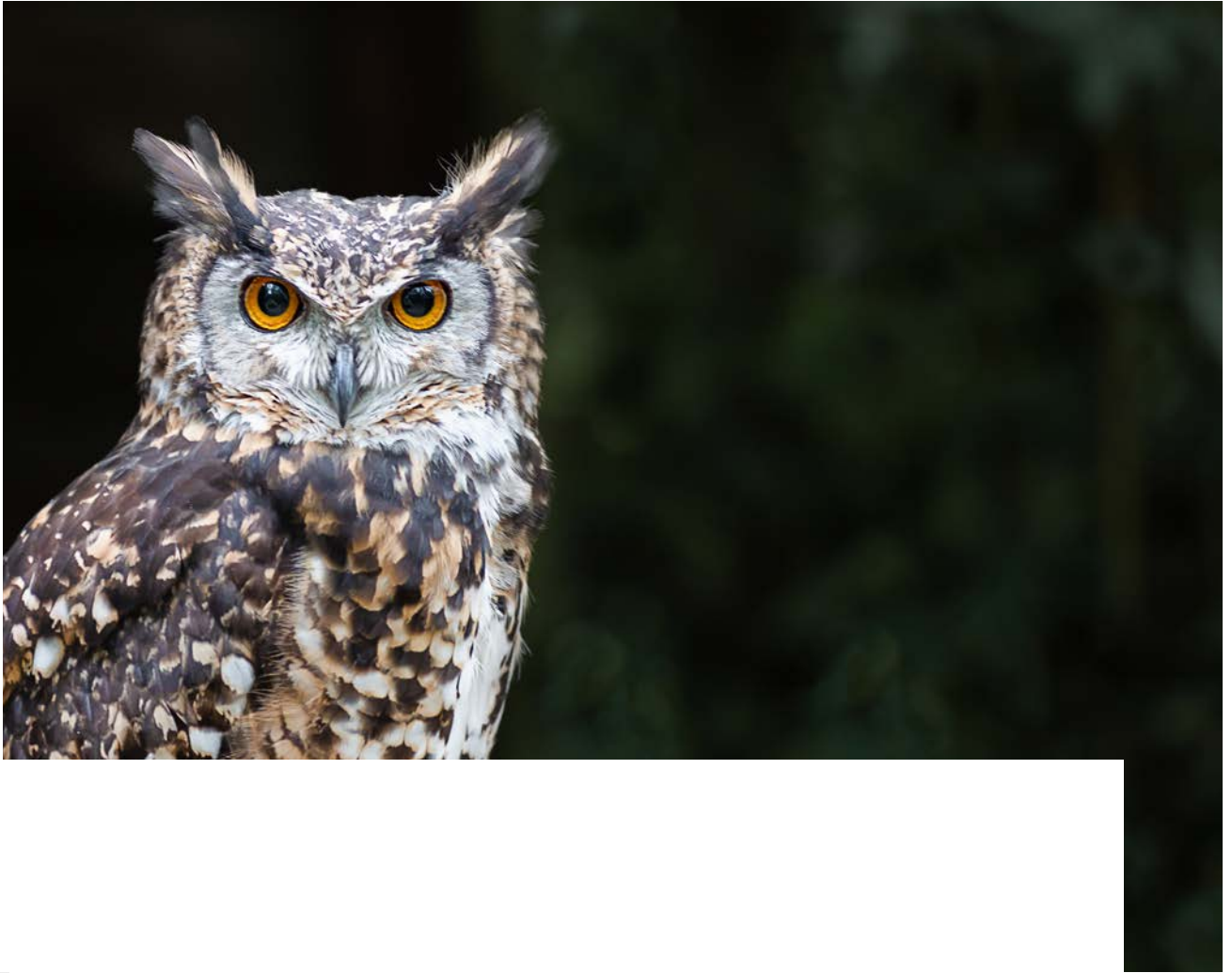
Through an ongoing commitment to providing our people with the necessary tools to aid their development, we have some of the most qualified advisers in our industry with a number achieving Chartered status.

By harnessing cutting-edge communication technology, Skybound provide a number of ways to keep in touch in addition to the more traditional methods of contact.

Rather than using complex algorithms to replace human Advisers, we are committed to embracing technology that allows us to enhance our service proposition, making us more efficient and allowing our Advisers to provide the personalist of touches.

Interactive web meetings, online conferencing and the Skybound Investor Portal place your Adviser, and access to your investment portfolio, literally in the palm of your hand.





Vision & Values

International Integrity

We know that you will want to know the advice we give you about your personal wealth management is managed down to the smallest detail. And that includes the small print too.

All our advice is fully regulated with clear, transparent charging structures, full commission disclosure and a variety of Service Level Agreements to suit your budget. All of which is backed up by complete regulation everywhere we operate, from Miami to Geneva and all across the MENA Region, giving you a total Skybound experience wherever you choose to move to.

Furthermore our Global Partners Division will allow you to receive our individually tailored financial advice from wherever in the world your life might take you.



“

*Our aim is not to be
different, or unique - but
to be the best at what we
do, with a strong emphasis
on attention to detail and
professional integrity.*

”



Our Vision is simple

Through a combination of passion for what we do, a desire to innovate and our ambition to define the future of the offshore advice industry, we aim to be the anchor that keeps you grounded whilst allowing your investments to soar.

Our values reflect this vision and include...

- Respect – mutual, long lasting and necessary for the success of business relationships.
- Achievement – Skybound is committed to rewarding honest achievement giving staff the drive and determination to deliver for their clients.
- Independence – Autonomy gives us the freedom to select the perfect financial solutions for each and every client. With a personal wealth manager allocated to our clients we are able to respond to changes in financial landscapes or situations.
- Forward thinking – We aim to exceed client expectations by regularly reviewing financial portfolios and procedures to ensure clients money is in the right place at the right time.
- Service – Our personal wealth consultants work together with the wider team to ensure effective management of funds and relationships. As a result our service levels are second to none.
- Protection – Skybound has built its reputation on giving clients access to safe and secure financial products. This gives our clients confidence that highly regulated areas such as tax, investment and savings, come with high levels of investor protection.

Our Goals

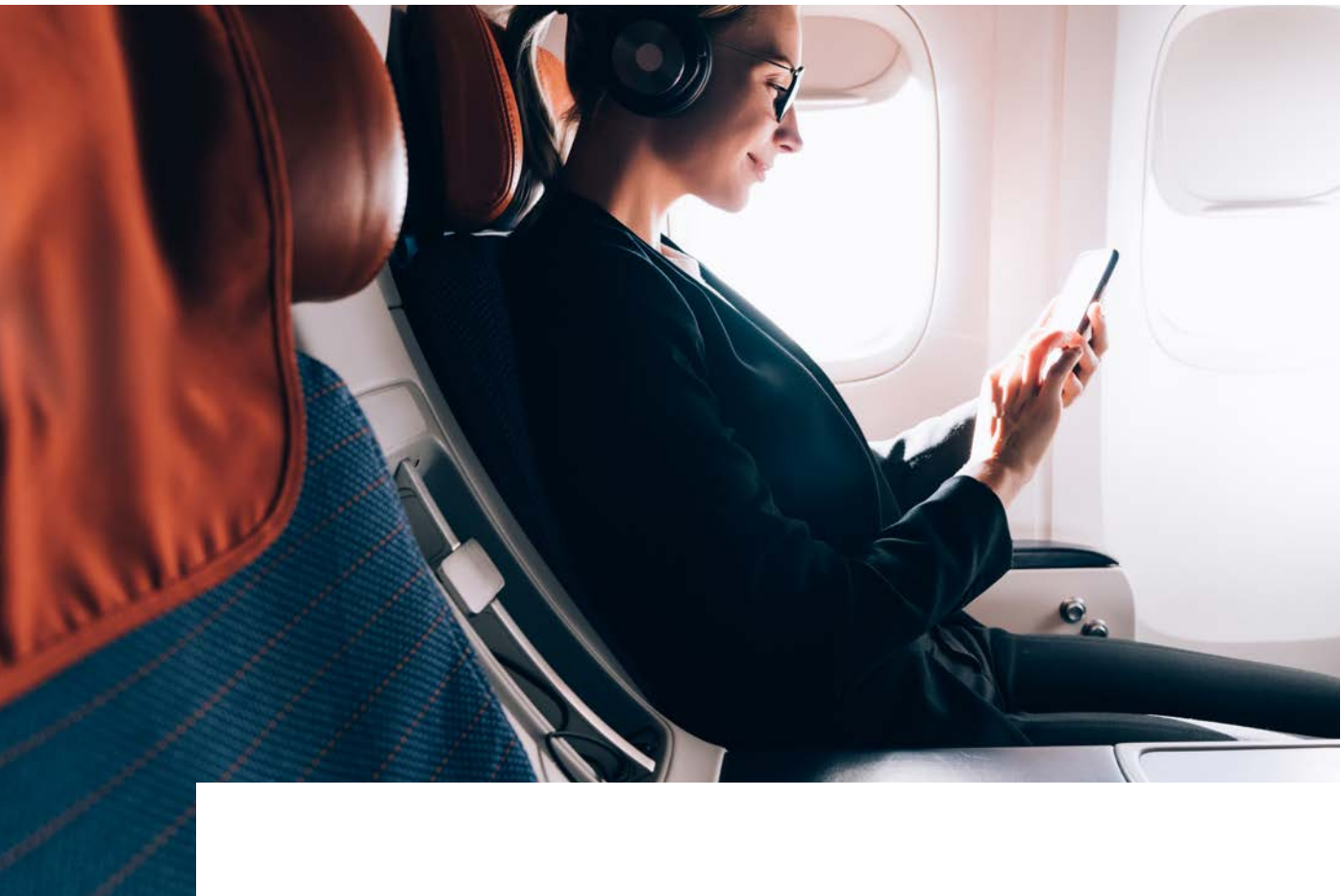
Bound together by a common purpose

Our goal is to continue investment and expansion to become the most respected financial planning company in the world.

Over many years Skybound has developed an excellent insight and understanding of the financial planning needs of the international community.

Our client base comes from professional people living and working away from their country of origin. Our clients come from a diverse range of backgrounds, which include diplomats, engineers, lawyers, accountants, bankers and entrepreneurs to name but a few.





Corporate Clients

Corporate Wealth Management

We can also help to make your day job easier with our range of professional corporate services designed to support the needs of your business or organisation. These service focused initiatives allow you to support and manage the needs of your employees.

Employee Benefits

Our main aim is to serve the international corporate community by advising, sourcing and implementing a wide range of employee benefit solutions including, but not exhaustive, group healthcare insurance, group pension schemes, gratuity replacement.

Added Value Service

Our added value services include employee benefit reviews, market assessments, provider selection and assisted implementation plus pro-active, ongoing client servicing throughout the term of the contract.

Corporate Financial Planning

We are also able to assist clients with other areas of corporate financial planning including director exit and succession planning, shareholder protection, corporate investment strategies and executive financial planning.





Our Services

Personal Wealth Management You Can Trust

At Skybound we take a holistic approach to wealth management advice, our financial advisers offer a full range of financial planning solutions that cater for much more than just your retirement. Our extensive spectrum of services and solutions, allows us to build a plan bespoke to your exact requirements, enabling you to realise your dreams and life goals.



Pensions

Pensions come in many different forms, carrying different benefits and structures. Contracts can be many years old, with hefty charges and old-style investments or very valuable with no reason for change.

At Skybound we can find out the details, we can look into this for you and ensure you are educated on what you already have as well as allowing us to open up discussions with you about your retirement planning, to ensure you have sufficient provision and can meet your goals; fit with your holistic planning and suit your family's needs.

Pension Transfer Service

Understanding your international pension benefits can be difficult and, with ever changing legislation, regular reviews and management of your fund are critical to delivering enhanced pension performance.

We can help you sort your SIPPS from your QROPS so all you have to do is dream of retirement, safe in the knowledge that your money has been working hard, just as you have.

Investment Committee

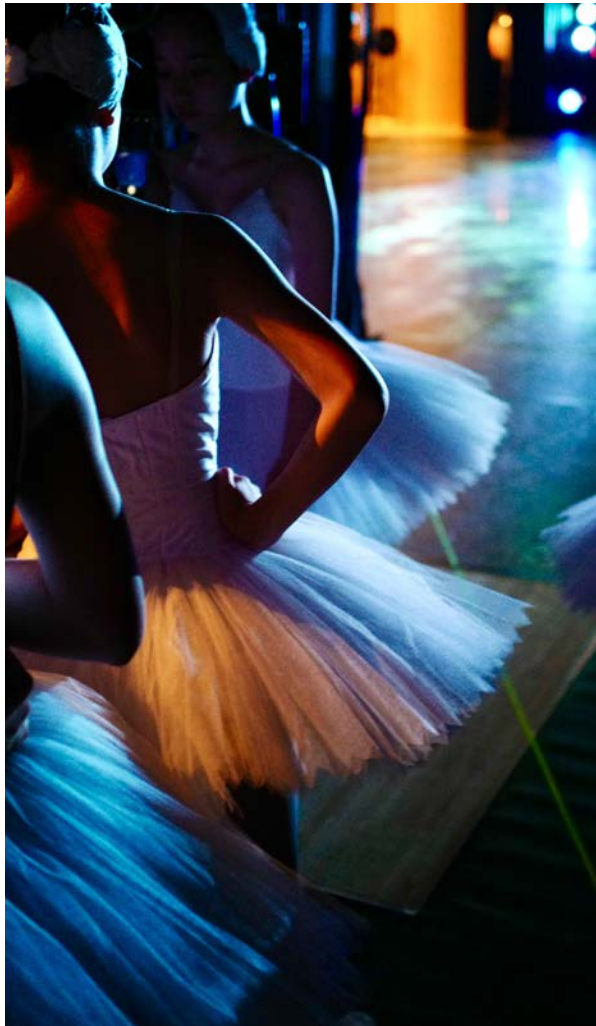
Financially planning and assisting you in achieving your financial goals is our key priority. Our in-house Investment Committee comprises of representatives from various departments of the business with a primary function of providing governance and oversight to the investment proposition of the business. Our industry-leading investment proposition is based on protecting existing wealth and building steady and consistent returns.



Lifestyle Financial Planning

Lifestyle planning aims to clarify what your hopes and aspirations for the future are and to choreograph your financial goals.

We can help you find out where you are now and most importantly, where you want to be. Let us help you to create a plan that will support the lifestyle you have now, and the one you want in the future.



Education Fee Planning

We all know that having children is one of the best and the most expensive things we ever do. And, to make sure the world is their oyster, a good education is a must.

We can help you ensure that your children enjoy the very best start in life and that, with a little financial planning, you can still be enjoying life with them too.

Life, Health and Wealth Protection

Protecting your investments and earnings is vital to ensure the security of your future and that of your family.

We can help you protect everything that you hold dear and make sure that whilst you are abroad you are adequately covered in every way – many things will be very different from at home.

Savings

Saving is a habit that everyone should have and whether you are looking for regular salary savings or long term off shore investments our advisers can guide you to find the best option for you.

We can help you make the most of your salary and your career abroad, assessing your attitude to risk and tailoring a savings programme to suit.



IHT Planning

Inheritance Tax can be a complicated matter, and having left your home country behind, it's important to understand what rules may still apply to you.

We can help you navigate your way through this, advise on what will be required from you and make sure that you have adequate provisions to cope.

Tax Planning

Whilst you may be earning money free of income and capital gains tax that doesn't mean you are necessarily free from tax altogether. Depending on your country of origin and where you intend to be in the future some taxes may apply to you. Skybound have tax efficient solutions and specialize in this area for Brits and citizens of the US.

Repatriation

There are close to 500 international globally based planning firms, and over 97% of these have no ability to offer regulated ongoing advice or service to British expats when they choose to return home. Skybound's Repatriation team exist to do just that. Working alongside you to ensure you aren't faced with any unexpected tax issues upon your return.

Currency Trading

Skybound FX is an online currency trading service that allows increasingly mobile international workers to make efficient and cost-effective money transfers using a wide range of currencies. As part of the service, you will have 24/7 access to detailed insights and up to the minute market data ensuring you can confidently trade at the optimum time to achieve the greatest possible return.

Live For Now, Plan For Later

Making the most of your journey

It's often difficult to plan ahead once you become an expat. However, from the basics such as bank accounts to dealing with foreign exchange and beyond Skybound can help you settle in, manage your finances whilst you're here and prepare for repatriation if and when you eventually decide to leave.

The Basics First

You'll need a local bank account to receive your salary as well as an offshore account to safely house your cash. It's prudent to keep anything over and above your normal expenditure in a jurisdiction that offers protection in line with developed nations such as the UK. In addition, you might want to exchange your local currency into something else, such as your home currency for future use.

Long Term Planning

Maybe your new life abroad and the tax savings are going to afford you to fulfil some dreams, get on the property ladder or start saving for your retirement. Whatever it is that you are wanting to save for it's important that you work with a lifestyle financial planner who can help you work towards your goals and aspirations.





Health Care

Medical bills are not free in many expat hot spots. In most cases your employer will offer you health insurance, but make sure you check the levels of cover you have – you may wish to pay to upgrade if the cover is basic.

Estate planning

Estate planning is very different for expats depending on where they have relocated to. In the Middle East for example, being under Sharia Law means that a husband cannot automatically leave his wealth, estate or even his children to his spouse. So it's important to understand local laws and get suitable wills, guardianship and protection plans in place.

Tax

For the majority of expats working overseas, income can be received free of tax. However, this is not the case for all nationalities. And the absence of a dual taxation agreement between your country of residence and your original domicile could mean that you are liable for taxes you are unaware of. For this reason, tax planning is essential to avoid tax bills you didn't think you were going to have.

Property

With demand for property remaining high, Skybound Property provide international investors with an end to end service encompassing sourcing, managing and beyond. Thanks to the projected capital growth and favourable exchange rates, property presents a prime opportunity for overseas investors. Our 360-service proposition takes the stress out of property investment keeping the whole process straightforward and hassle-free.

People

Our Senior Team



Ian Sweet

Chief Executive Officer

Having played an instrumental role in Skybound's expansion into various international markets during a previous ten-year stint with the company, Ian rejoined the Board of Directors in November 2020 and has since been appointed as Chief Executive Officer. Ian possesses a wealth of experience working at Board level both within the public and private sectors. He holds the highest internationally recognised professional compliance qualification & is the holder of the QGJ Medal.

With a passion for personal and professional development that exists throughout the company, and comprehensive development support, we empower our people to be the very best they can be as we strive as a collective to not only remain at the forefront of international financial planning, but to lead its evolution.



Husain Rangwalla

Chief Operating Officer

Since joining the company in 2017, Husain has played an integral role in countless upgrades and new initiatives designed to improve Skybound's overall value proposition. His achievements led to him being appointed as Chief Operating Officer.

Husain has played a key role in the restructuring of the Global Partners Division, taken the lead on developing the company's CRM system and assisted in the recruiting and developing of fresh talent into Skybound.

Having left university with a BA Honours (Economics) and BSc Honours (Finance), Husain has since achieved CFA Level 1, CISI Level 3 and CII Level 1 qualifications allowing him to gain a sound understanding of operations and propositions within the industry.



Josh Burton

Chief Financial Officer

Having joined Skybound in 2014, Josh played an instrumental role in the finance team's relocation from the UK to Dubai in 2016.

As Chief Financial Officer, Josh is responsible for managing the company's financial operations and strategy. Well versed in SME audits, VAT, personal and corporation taxes, Josh uses his experience to deliver effective financial leadership working alongside all key stakeholders.

Prior to joining Skybound, Josh spent 4 years working for a large audit and accountancy practice in Yorkshire whilst studying firstly towards his AAT qualification before achieving Chartered status in 2015.



Mike Coady

Non-Executive Director

Mike is recognised at the forefront of financial planning as a financial advice mentor who demands only the best outcomes for both individuals and businesses. Mike has a proven 23 year track record and has worked in both the UK and International markets.

Mike's reputation in the offshore advice world is unrivalled. Having held senior positions at a number of firms, he brings a drive and different view to how we do business.

Mike is qualified to UK Financial Conduct Authority (FCA) standards, a member of the Chartered Insurance Institute, a Founding Fellow of the Institute of Sales Professionals (FF.ISP), a Fellow of the Institute of Directors (FIoD) and featured as a highly qualified Financial Adviser in Which Financial Adviser.



Peter Gollogly

Regional Director - Europe

Having already helped establish and expand new regional offices on two continents, in his role as Regional Director- Europe, Peter has oversight of Skybound's regional advice teams across the region, and supports them in constantly striving for improvement.

A Chartered member of the Institute of Securities and Investments (Chartered MCSI), Peter also holds the CISI qualifications: a Certificate in Wealth Management, UK Regulation and Professional Integrity (IAD) and Investment, Risk and Taxation (IAD).

With the perfect mix of experience, talent and tenacity - from Intern to Regional Director, Peter is a true example of the meritocracy within Skybound.



Carla Smart

Head of Skybound Pension Advice

Carla has spent over a decade helping expatriates to manage their finances effectively, and has been learning, to some extent first hand, of some of the challenges faced when living abroad. Although equipped to deal with all aspects of financial planning, her primary area of expertise is pension planning.

In addition to advising her own clients, Carla heads up Skybound Wealth Management's Pension Services division providing ongoing training and support to all Skybound regional offices.

She has completed numerous UK and International qualifications including the Level 6 Advanced Diploma in Financial Planning. Following the completion of this diploma, she was awarded the title of Chartered Financial Planner.



Tom Pewtress

Head of Technical

An individual with an exceptional level of technical knowledge and a proven track record in leading successful teams, Tom provides Advisers with technical support for those investors who have more complex requirements.

As well as enhancing our existing proposition, Tom will focus on future legislation and ensure both clients and advisers are in the best position to act with confidence when any changes occur.

Through regular webinars, training sessions and product updates, Tom constantly strives to ensure Skybound Wealth's Financial Planners are some of the most knowledgeable in the industry.

Our Senior Team Continued



Nicolene Van der Merwe

Group Head of Compliance

Nicolene is an accomplished leader in compliance, boasting a nearly two-decade track record within the global financial sector, notably wealth management and financial planning. She brings a wealth of expertise in driving effective and ethical governance within complex organisational structures.

Thanks to her extensive knowledge and experience, Nicolene is well versed in the intricacies of cross-border regulatory landscapes, and ensuring adherence to industry standards and legal requirements at all times.

Nicolene prides herself on developing and executing comprehensive compliance and risk management strategies across various jurisdictions, to mitigate potential risks and ensure organisational integrity.



Ryan Donaldson

Regional Manager - Europe

Having consistently established client books in a number of jurisdictions, and more recently playing an instrumental role in the growth of the Switzerland operation, Ryan was promoted to Regional Manager - Europe in 2022.

Ryan's professionalism and application to the job is infectious and makes him the perfect example to mentor both new and experienced advisors in Skybound's European offices.

A Level 6 Chartered Member of the Chartered Institute of Securities and Investments who has held positions in the Middle East and Central Europe, Ryan knows exactly what is required for expatriate workers to make the most of their international status.



Bryan Bann

Regional Manager - Switzerland

As Regional Manager of Skybound's Switzerland operation, Bryan possesses a depth of knowledge when it comes to cross-border financial planning and vast experience of developing others around him.

Bryan graduated from the University of Strathclyde in Glasgow with a master's degree before moving into the world of financial services. He is now a member of the Chartered Institute of Securities and Investments (CISI).

Putting his technical knowledge and understanding to use, Bryan works in conjunction with his clients to create and implement a comprehensive and robust financial plan designed to ensure that the financial future of his clients and their families is secured.



Jonathan Lumb

Regional Manager - UAE

Prior to being appointed as Skybound's UAE Regional Manager in 2022, Jonathan has been a senior consultant at Skybound Wealth Management for over 11 years. He possesses a depth of knowledge in financial planning, investments and pensions.

Having worked in the U.K., Australia and 13 years in the Middle East, Jonathan has the experience and understanding to assist clients with financial planning advice and security on a domestic and international level.

Using his experience and knowledge, Jonathan works alongside you to create and implement a comprehensive financial plan designed to ensure your long-term ambitions becomes a reality and your future lifestyle is protected.



Edmund Teasdale

Managing Partner - UAE

As Managing Partner, Edmund helps oversee Skybound Wealth's Middle East Offices and has over 10 years' experience working alongside clients globally on a one-to-one basis. As one of Skybound's most qualified financial planners, Edmund will assist you with a comprehensive plan for your future.

Edmund started his illustrious career at a large international financial services company in London before moving to the Middle East in 2010. During his time in the region, Edmund has held a number of roles working exclusively with High Net Worth and Ultra High Net Worth clients. Having operated at the highest level of wealth management internationally, Edmund made an effortless transition to Skybound's Management Team in 2022.

Edmund holds Associate Chartered status, awarded by the Personal Finance Society (PFS) and the Chartered Institute for Securities & Investment (CISI). As a specialist in complex financial planning and investment management, Edmund is able to provide a truly holistic service to international investors.



Daniella Lee

Group Head of Human Resources

As the Head of HR at Skybound Wealth Management, Daniella is a forward-thinking leader deeply committed to delivering results and aligning HR initiatives with the company's strategic objectives. Her primary focus is on providing exceptional HR support to SWM, with a relentless drive to enhance commercial success through the implementation of effective HR business plans. Collaboration is at the core of her approach, ensuring that our people always remain at the forefront of SWM's operations.

Daniella boasts over 8 years of HR experience, having worked with a FTSE 350 company in the UK and various dynamic start-ups and SMEs. Her dedication to professional development is evident through her attainment of a CIPD Level 5 qualification in HR Management, a skill that perfectly aligns with the company's value of a steadfast commitment to ongoing education.

In 2020, Daniella made a strategic career move to Dubai, underscoring her commitment to advancing her career in HR. In joining SWM, she sees a natural progression in her HR journey, bringing her wealth of experience to contribute effectively to SWM's HR strategies and overall success.



Rashmi Awtami

Group Head of Finance

Rashmi is an ACCA qualified member and has been with the wider group for 5 years. Starting as an Accounts Assistant and progressing to her current role as the Group Head of Finance, she is a strong example of a progressive career growth at Skybound.

Taking the reins of the group finance function, she oversees payroll, cash flow planning, forecasting, budgeting, reporting and more. She presents key insights for short and long-term decision making to support the Skybound board while also satisfying compliance obligations in multi-jurisdictional tax systems.

Rashmi manages a team of accountants supporting the department, who actively contribute to the inclusion of transparency, development and proactiveness throughout financial operations.

What Our Clients Say...

At Skybound Wealth we are constantly asking our clients for feedback to enable us to gauge the service provide and identify ways we can improve.

With over 400 reviews rating Skybound Wealth 4 star or above on Trustpilot, here are some of our most recent reviews:

Charles says...

The review was based on facts and statistics. Informed advice was given based on the review of my financial position, balancing the risks and benefits associated with my current and future financial position. Outlook of future investments with attractive returns was provided based on historical data.

Bobby says...

Just had my review. Professional as always. Being able to meet online was a great help too, even if I do struggle with the modern technology, my advisor talked me through how to use Zoom!

Anthony says...

Professional and efficient team based in UAE providing clear advice on investment structure and portfolio spread removing the headache from day-to-day management.

Magdalena says...

Skybound Wealth Management financial advisors have been helping me for few years to manage my finances. They never go wrong with advice or switching the funds.

Mandy says...

I continue to have good working relations with Skybound Wealth Management. The team is professional in responding to requests and also follows up to ensure action is taken timely. They are responsible, flexible and take into consideration the concerns of their clients.

Ebix says...

My experience was very cordial, informative, and professional. I got the impression that I was dealing with a very knowledgeable and experienced individual. I am a very satisfied customer and cannot wait for the next review.



Working Together For A Brighter Future

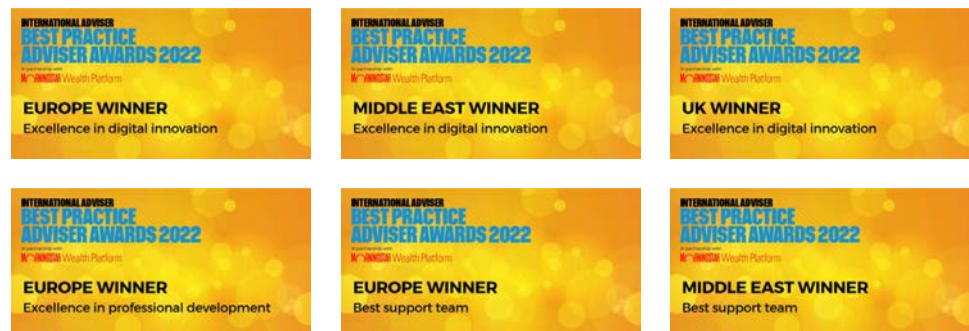
Through a combination of passion for what we do, a desire to innovate and our ambition to define the future of the offshore wealth advice industry, Skybound Wealth Management exists to guide you through the important financial decisions required today, to ensure you benefit from the freedom of tomorrow.

Award winning international financial planning advice from Skybound Wealth Management.

In the words of International Adviser, "Skybound Wealth is an established business with an impressive track record, impressive plans, extensive regulations a great strategy and all-round client focus."

Skybound Wealth received seven awards across three jurisdictions, which recognise the efforts of every member of the Skybound family.

Our International Adviser Awards 2022



Our International Adviser Awards 2021



Skybound Wealth Management is a signatory of the United Nations Principles for Responsible Investing (PRI).

As signatories, Skybound Wealth commits to upholding PRI principles that aim to develop a more sustainable global financial system. Part of how we do this is by integrating ESG considerations into our investment portfolios.

Signatory of:





Our Offices

Company Map

Switzerland - GENEVA

Tel: +41 (0) 22 518 0286

UAE - ABU DHABI

Tel +971 4450 9799

UK - LONDON

Tel +44 (0) 208 706 0906

USA - HENDERSON (NEVADA)

Tel +1 (702) 608 8293

USA - MIAMI

Tel +1 (786) 408 7703

UK - SHEFFIELD

Tel +44 (0) 1302 703128

UAE - DUBAI

Tel : +971 4450 9700

 **SKYBOUND**
WEALTH MANAGEMENT