



SO WHO IS

Daniel Mesa

Financial Advisor



SKYBOUND
WEALTH MANAGEMENT

Helping To Secure Your Future.

Wherever You Are Today.

Daniel Mesa

Financial Advisor

Daniel is a Financial Advisor with Skybound Wealth Management, LLC. His previous experience as Division Manager for one of Miami's most prominent real estate firms provides the foundation for his role as a financial advisor.

His highly motivated, solution-oriented and responsive business style is well-suited to the needs of his clients, who appreciate his intense work ethic and commitment to a quick turnaround – and his role as a fiduciary in advising them in their best interests.

Achieving your retirement goals takes more than just hard work and sacrifice... it also takes knowledge and resources. Daniel takes pride in working with clients, big or small, to not only navigate the situation, but set them up for the long term.

Daniel received his Bachelor of Arts degree from Hamilton College, with concentrations in Chinese and International Relations. He enjoys playing tennis, weightlifting, kayaking and traveling.

SKYBOUND
WEALTH MANAGEMENT

Advisory Services offered and provided through Skybound Wealth Management USA, LLC.
No guarantees of investment success are offered. Investing involves risk including the loss of principal.

Skybound began in the UK over 20 years ago and today we have offices in many of the world's largest financial centres. Skybound works under regulations within every jurisdiction in which we operate and are supported by a global services department that 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 are alongside them.

Daniel is a US licensed Advisory Representative, meaning he is well placed to advise in all areas of personal financial planning including:

- ③ U.K. pensions
- ③ IHT planning
- ③ US pensions including 401k rollovers
- ③ Access to insurance analysis or insurance products and service through licensed professionals
- ③ Retirement planning
- ③ Wealth management

Managed Portfolio Service

- ③ Quarterly reviews of your portfolio
- ③ Yearly in depth assessment of your overall financial plan and tax requirements
- ③ Full access to the investment and tax planning team

Why Skybound?

Like feathers in the wind, the life of an international worker can take them to the most random and wonderful places as they excel in their careers. And often with this change comes opportunity.

Opportunity to experience new cultures and traditions, along with an increased earning potential allowing them to secure the perfect future for their family for generations to come.

Combining a wealth of experience, with global coverage and local knowledge, Skybound are always on hand to guide you through the important decisions required today, to help give you the opportunity to potentially benefit from the freedom tomorrow brings.

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

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Meet Your Back Office Specialists.

Our carefully measured, committee led approach enables us to create and manage unique and tailor-made portfolios covering the full spectrum of management styles, strategies and asset classes.



Jonathon Curtis Head of Investment Research

Jonathon oversees Skybound's investment strategy for group-wide assets of \$1bn, and chairs our Investment Committee. He is responsible for all fund research and building investment portfolios that aim to deliver strong long-term returns. Jonathon is on hand to support both clients and Skybound advisers on investment matters wherever they are in the world.



Carla Smart Trust & Pension Specialist

Carla specialises in helping people to plan for their ideal retirement. She has completed numerous UK and International financial qualifications, including her Diploma in Regulated Financial Planning, her AF3 Pension Planning and AF1 Personal tax and trust planning exam. She is able to use this knowledge for the benefit of Daniel's clients.

One Team. Multi-Experienced Professionals. Tailor-Made Solutions.



Christine Ashwell Associate

Christine built up her knowledge over a five year period and brought her skills over to Skybound in 2018 where she now supports the USA team and clients ensuring the transfer of benefits runs smoothly and quickly as possible. Christine is currently working towards her qualifications in pensions and retirement planning.



Jennifer Vega Associate

Jennifer joined Skybound over 2 years ago to provide leadership and support to all members of the advisory team. As part of her role Jennifer is responsible for all office procedures, and uses her exceptional organizational skills to ensure a smooth client journey.

We believe our people are Skybound Wealth Management LLC's greatest strength



Nathan Tarr
Regional Manager & Senior Financial Advisor



Mark Langley
Financial Associate & UK Pension Specialist



Lewis Ringham
Senior Financial Advisor



Danny Agg
Financial Advisor



Daniel Mesa
Financial Advisor



Simon Putt
Senior Financial Advisor



Nicolas Mauricio
Financial Advisor



Bradley Mitchell
Senior Business Development Manager



Daniel Leigh
UK Pension Specialist & Financial Advisor Assistant



Connor Bryant
Business Development Manager



Craig Murrin
Senior Financial Advisor



Dominic Kay
Paraplanner



Michael Jordan
Senior Financial Advisor

US Specialist Information Centre



Tom Pewtress
US Cross Border Financial Planning Specialist



Sam Ling
Global Partners Advisor

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“
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having high standards
among its peers.
”



SKYBOUND
WEALTH MANAGEMENT

Financial advice from our offices on the East & West Coasts of the USA.

Skybound's team of experienced financial planning professionals provide independent advice to international professionals and global investors across the USA. We understand the local hurdles that expats need to overcome and have first-hand knowledge of how to use your international status to work toward your investment goals.

Lifestyle Financial Planning

Aside from the lifestyle and experience, UK expats relocate to the USA in search of an improved way of life and higher salary. This increased earning potential presents a great opportunity to save for your future while you're away.

Find out if you are making the most of your money?

Skybound advisers will help you understand your wealth to help position it, so that it works as hard for you, as you did to earn it in the first place. The objective is to create a flexible plan based on your income and expenditure that caters for more than just your retirement.

Helping To Secure Your Future. Wherever You Are Today.

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Financial Advisor

200 S Biscayne Blvd
Suite 2930
Miami FL 33131

e: daniel.mesa@skyboundwealthusa.com
www.skyboundwealthusa.com

m: (305) 905 0531
t: (786) 408 7703



Skybound Wealth Management, LLC is part of the Skybound Group for all Group regulatory details please visit <https://www.skyboundwealthusa.com/regulations>. Skybound Wealth Management USA, LLC through its Advisors offers investment and financial advisory services and is a registered investment adviser.

SEC number :801-121157. CRD number is 313358. Registration with the SEC does not imply a certain level of experience or education and does not mean the SEC approves or endorses Skybound Wealth Management USA, LLC.