

# SKYBOUND

WEALTH MANAGEMENT



**Securing Your Future.**

Wherever You Are Today.

# Working Together For A Brighter Future

Financial Planning Designed With You In Mind.

**Skybound Wealth Management Limited is part of a global network of leading international independent Financial Advisory Companies which has been providing client-conscious financial advice for almost 20 years.**

Our primary focus is quality and this ethos is at the forefront of everything we do – our people, our advice and our achievements.

Our team utilises highly reputable procedures and financial products across diverse global markets to ensure success and profitability for our clients.

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.



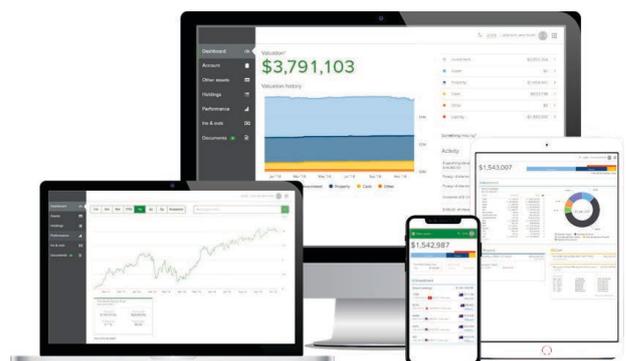
“  
*Every client and every  
relationship counts, with  
mutual trust being pivotal  
to the success of the  
partnership.*  
”

## Tech With A Human Touch

Through an ongoing commitment to providing our people with the necessary tools to aid their development, we have some of the most qualified and experienced advisers in our industry on hand to support you.

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.

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.*



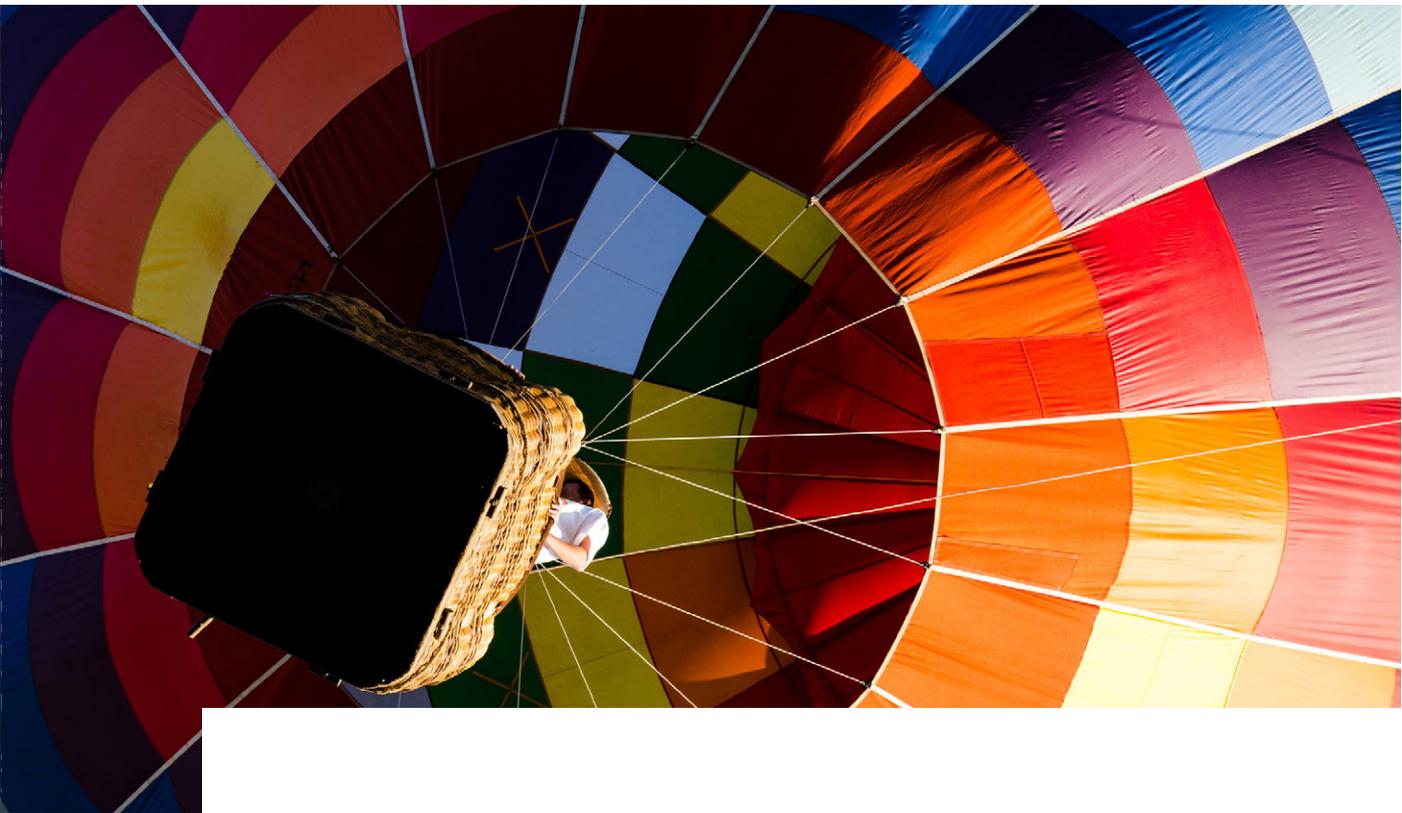
## Repatriated to the UK, or moving to the UK

# Global Mobility

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.

Skybound has been providing financial advisory services to UK based clients since 1994. Although a traditional financial planning firm we have grown over the years in line with our clients' needs and the ever-changing financial services environment. With the increase in global mobility Skybound has expanded its specialism's to assist clients who have either repatriated to the UK from a time abroad, or those clients moving to the UK who have existing financial plans which were/are more suited to the International Investment environment. That said we remain true to our roots.





## Vision & Values

Our Vision is simple. To create a brand that instills pride in its employees, clients and business partners, enabling all involved to assist in building the most respectable financial planning company in the world.

### Our values reflect this vision and include...

#### Commitment

Our commitment to finding new ways of enhancing the overall service we provide stems from a client centric approach that runs right through the heart of our company.

#### Responsibility

Every decision we make, both collectively and as individuals, always comes back to how our clients will benefit.

#### Professionalism

Taking pride in everything we do and upholding the highest standards of professionalism in every thing we do.

#### Continuous Learning

We empower our people to be the very best they can be, and provide our clients with the information they need to successfully achieve their personal goals.

#### Team Ethos

All individuals work with the wider team to ensure the very best service is provided to all Skybound clients



## Our Goals

# Your Future Is Ours

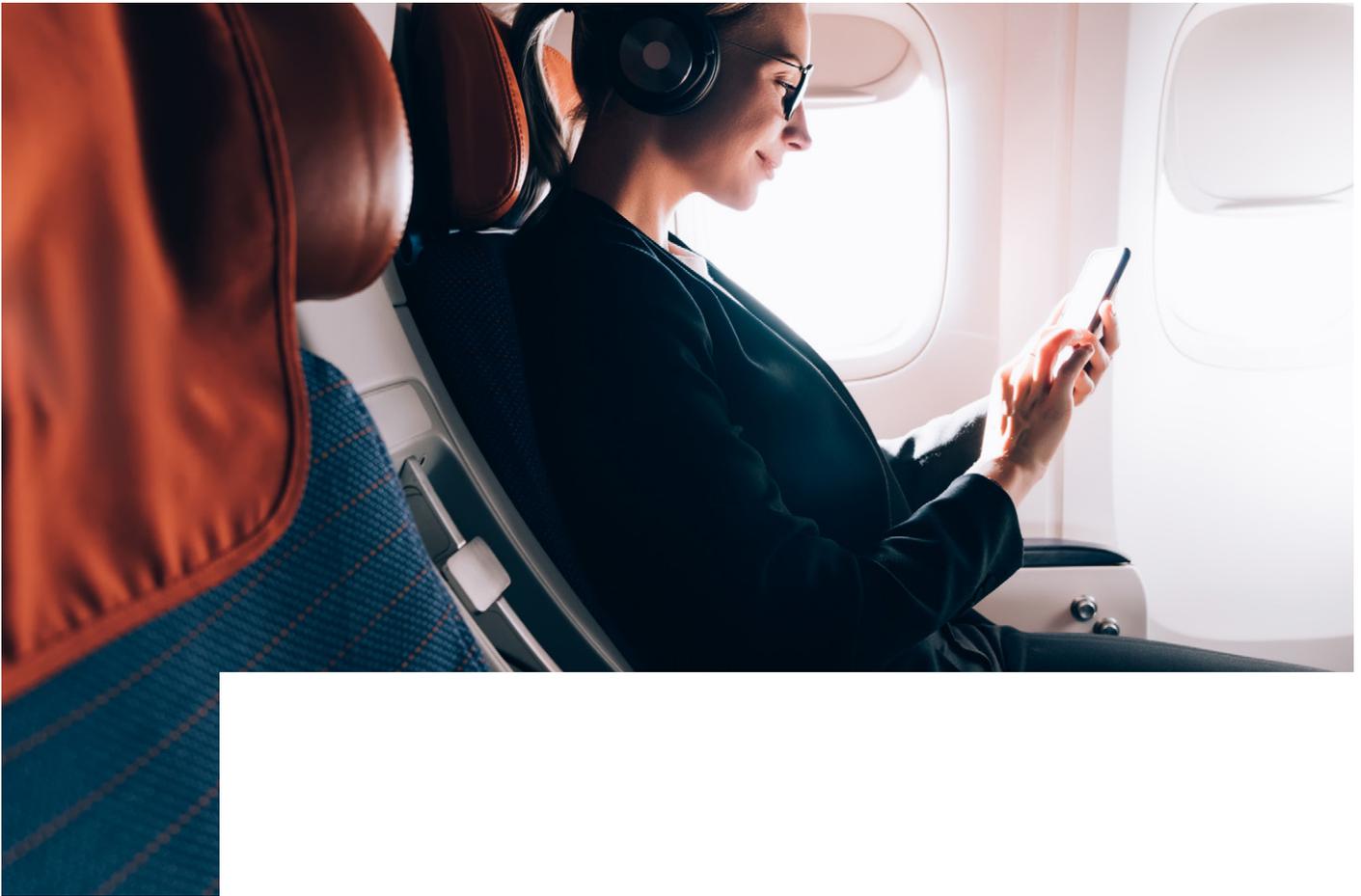
The biggest investment we make isn't into a single stock or share, it's our commitment to helping you realise the future you deserve. Bound together by a common goal, our success relies upon the realisation of your dreams.

Over many years Skybound has developed an excellent insight and understanding of the financial planning needs of people at all stages of the investment cycle.

Our clients come from a diverse range of backgrounds, which include diplomats, engineers, lawyers, accountants, bankers and entrepreneurs to name but a few.

In our experience your financial objectives will alter over time due to changes in your circumstances. We believe that it is essential to ensure that your portfolio continues to meet your lifestyle and investment objectives.





## A Broad Range of Wealth Planning Solutions Tailored To Your Needs

It's important to identify what you might want to achieve and how you can do this. We can help you to identify your goals and create a plan for your finances to help you achieve them. When investing it is important to have confidence in the expertise you have available to you. Within Skybound we offer that through our knowledge and experience.





### **Protection Planning**

Having adequate cover in place means that your family will receive a helping hand right when they need it most, and you will be able to effectively pass on your wealth to your children.

### **Inheritance Tax Planning**

The idea of working your whole life and then having to pass a large slice over to the state can leave a bitter taste in many people's mouths. However, with careful planning there are ways to minimize or even eradicate any such liability and ensure that your life's wealth goes to the people you want it to.

### **Investments**

If you're thinking about investing for the first time, it may seem a rather daunting step. You might not be sure what the difference is between a share, a bond and a fund, let alone which one could be right for you. In reality, rather than focussing on a single product, your investment portfolio should be split between a range of asset classes.

### **Repatriation**

Skybound is part of a global network of companies, this allows us to fully understand the various international financial solutions available and how these work once a person becomes a UK resident. Our Repatriation team are dual qualified and experienced in moving overseas assets into the UK and are able to help clients do this in the most tax efficient and simplest manner.

### **Pensions & Retirement Planning**

Your Adviser will help you to work out which is the best solution for you depending on your needs and objectives. As pension legislation changes, so too do your options so it's important to keep up to date. Careful pension planning is essential to any financial plan and getting it right is paramount.

### **Tax Efficient Savings**

There are a number of ways in which you can invest for tax efficient purposes, Skybound offers a wide range of choice for investors, giving them the ability to make a choice suited to their own preferences and priorities.



## Our Services

# Personal Wealth Management you can trust

In order to provide comprehensive wealth management advice, our financial advisers offer a full range of financial planning solutions, so that you can source all of your requirements from one organisation. This simplifies a potentially complex process and enables clients to obtain all answers to their questions from one reliable source.

### **Pensions**

Pensions come in many different forms, carrying different benefits and structures. Contracts can be many years old, with hefty charges and dated 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 families needs.

### **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.



## People

# Our Senior Team



## Josh Burton

### Chief Financial & Operating Officer

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

As Chief Financial & Operating Officer, Josh is responsible for Finance, Operations, Administration, IT, Compliance and Human Resources. 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.

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## Fiona Neill

### Skybound Wealth Management Limited, Managing Director - Senior Financial Planner

Fiona joined Skybound as a financial adviser to help the business grow organically, and now also manages Skybound as a director of the business in her dual role. Fiona is also a member of the CII and is a Level 4 Qualified Adviser to UK Standards (DipPFS) and is also a qualified US Investment Advisor.

Fiona has spent 8 years overseas working in the Financial Services Market which has provided her with a strong background and understanding of the international products and how best to make these work for you upon your return to the UK. Fiona keeps up to date with changes in UK regulations and her advisory approach is to ensure that clients are educated and engaged in their long term financial plan. Fiona works with clients specific needs and is available to all clients via telephone or face to face meetings UK wide.



## Faisal Mahboob

### Compliance Manager

A solution-oriented and diligent Compliance Manager, Faisal has operated in challenge-driven compliance, investment management and consultation environments; within the banking and the private finance sector for 17 years.

Faisal is responsible for keeping up to date with the ever-evolving regulatory landscape within the financial world, and to ensure all areas of the Skybound group of companies comply with the required rules and regulations.

He works alongside regulators to prepare reports whilst also providing exemplary support, guidance and advice on compliance matters to all Skybound entities.

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## Jeff Pollock

### Senior Financial Planner

Jeff is a member of the Chartered Institute of Securities and Investment, holding a Level 4 Diploma in Investment Advice (Financial Planning & Advice) as well as holding a qualification in United Arab Emirates Financial Rules and Regulations. Prior to this Jeff completed a BSc in Finance and Business at the University of Sussex.

Jeff spent 4 years overseas working as an international financial adviser, gaining knowledge of a vast array of international products and funds whilst also keeping himself up to date with UK rules and regulations. Since returning to the UK Jeff has specialised in helping expat clients returning home as well as international clients moving to the UK. His detailed knowledge of both overseas and FCA regulated products enable him to offer in-depth holistic financial advice to clients and help them reach their long term financial goals.



**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



## Regulations

# Company Summary

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Skybound Wealth Management is a group of several organisations, each of which is a separate legal entity registered in the relevant jurisdictions in which they operate. The advice provided to you in the respective jurisdictions will be in accordance with the scope of Skybound's regulatory authorisation in that jurisdiction.

### **Skybound Wealth Management Ltd**

Skybound Wealth Management Ltd is authorised and regulated by the UK Financial Conduct Authority.

**Registered Office:**

MBP3, Meadowhall Business Park, Carbrook Hall Road, Sheffield, S9 2EQ

**Regulatory Details:**

Financial Services Register Number 217994.

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### **Skybound Wealth Management Abu Dhabi**

Skybound Wealth Management Ltd is Authorised and Registered with the Securities and Commodities Authority.

**Registered Office:**

Unit 605-606, Guardian Towers, 4th Street, Sheikh Sultan Bin Zayed Road, Abu Dhabi, UAE.

**Regulatory Details:**

SCA Registration Number 608018.

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### **Skybound Insurance Brokerage Dubai**

Skybound Insurance Brokerage LLC is authorised by the United Arab Emirates Insurance Authority.

**Registered Office:**

Unit 301, Opal Tower, Business Bay, Dubai, United Arab Emirates.

**Regulatory Details:**

Insurance Authority Registration Number 251.

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### **Skybound Wealth Management USA LLC**

Skybound Wealth Management USA LLC are registered with the Securities and Exchange Commission (SEC) SEC number 801-110724 : CRD number is 288833.

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### **Skybound Wealth Management Switzerland**

Skybound Wealth Management SA is a member of the Association Romande des Intermediaires Financiers (ARIF). Federal identification number CH-660-0223007-3.

**Registered Office:**

Route de Pré-Bois 20, 1215 Cointrin, Meyrin, Geneva.

**Regulatory Details:**

ARIF Member Number 3222



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t: +44 (0) 208 706 0906

[www.skyboundwealth.co.uk](http://www.skyboundwealth.co.uk)

