SO WHO IS

Simon Putt

Senior Financial Advisor

SKYBOUND

WEALTH MANAGEMENT

Securing Your Future.

Wherever You Are Today.

Simon Putt ACSI, CII (Award)

Senior Financial Advisor

Simon brings nearly 30 years' experience working in the financial services industry. He spent over 20 years working as a Debt Capital Markets specialist in the City of London and in Dubai, heading regional teams for HSBC, Credit Agricole and BNP Paribas.

After all those years he opted for a change of career and a new challenge, and he entered the more spiritually rewarding arena of financial planning and wealth management. His core philosophy is to be the kind of advisor for his clients that he would always have wanted for himself. This means Simon strives to put a premium on communication, consistency and transparency. Over the years he has worked with expats of many different nationalities and industries, and currently he specialises in US Cross Border Advice for US nationals, US-connected people, and people who have assets in the US.

His experience as a holistic financial planner comes from working on products across investments, savings, pension planning, legacy planning and foreign exchange. Simon holds a Master of Arts degree from the University of Oxford and a Postgraduate Diploma from the London School of Economics. He is an Associate Member of both the Chartered Institute for Securities and Investments and the Chartered Insurance Institute, and he is Series 65 licensed and SEC-registered to act as an Investment Advisor Representative in the United States.

SKYBOUND
WEALTH MANAGEMENT

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 many jurisdictions 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. We believe this client-centric approach to financial planning provides clients with the certainty that wherever they are, Skybound are alongside them.

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

- US Retirement Assets
- Non Qualified Investments
- International Pensions and Investments
- Access to insurance licensed professionals.
- Financial Planning Analysis to include Retirement, education and succession planning.
- Repatriation

Managed Portfolio Service

- Bi-Annual reviews of your portfolio
- Yearly in depth assessment of your overall financial plan
- 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 work towards the perfect future for their family for generations to come.

Combining 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 Associates.

Our committee led approach enables us to create and manage 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

International 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.

One Team. Multi-Experienced Professionals.

Merlin Evans

Business Development Manager

Merlin works closely with the advisory team as he continues his efforts towards becoming a financial advisor in his own right. His personal experience of working overseas means he is well-positioned to understand and solve the challenges faced by US nationals and ensuring they are introduced to the most suitable member of our specialist team.

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.

Skybound Wealth Management, LLC is a division of Skybound Group. Skybound Wealth Management, LLC has access to other professionals based in the United Kingdom for support. The individuals are employees of Skybound Wealth Management.

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

Nathan Tarr
Regional Manager & Senior Financial Advisor

Lewis Ringham
Senior Financial Advisor

Daniel Mesa
Financial Advisor

Nicolas Mauricio
Financial Advisor

Daniel Leigh
UK Pension Specialist & Financial Advisor Assistant

Craig Murrin
Senior Financial Advisor

Michael Jordan
Senior Financial Advisor

Mark Langley
Financial Associate & UK Pension Specialist

Danny Agg
Financial Advisor

Simon Putt
Senior Financial Advisor

Bradley Mitchell
Senior Business Development Manager

Connor Bryant
Business Development Manager

Dominic Kay
Paraplanner

US Specialist Information Centre

Tom Pewtress
US Cross Border Financial Planning Specialist

Sam Ling
Global Partners Advisor

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

Skybound strives to maintain a reputation of having high standards among its peers.

SKYBOUND
WEALTH MANAGEMENT

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

Lifestyle Financial Planning

As a US expat seeking to enjoy the experience of an international lifestyle, your financial planning should not be compromised. Skybound's team are here to help you navigate some of the complexities that arise when becoming an expat.

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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Senior Financial Advisor

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SKYBOUND
WEALTH MANAGEMENT

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