SO WHO IS

Nicolas Maurico

Senior Financial Advisor

SKYBOUND

WEALTH MANAGEMENT

Helping To Secure Your Future.

Wherever You Are Today.

Nicolas Mauricio

Senior Financial Advisor

Nicolas is a senior financial planner for Skybound Wealth Management, LLC. Having spent 3 years with Northwestern Mutual a U.S based planning firm, he aims to provide a strong knowledge base and great work ethic to our firm. Originally from San Antonio, Texas he is now based in Miami and well placed to work with current and new clients.

Nicolas studied at Texas State University where he graduated with a degree in Finance. Once completed, he received his series 6, series 63, and Life & Health certifications. With the vast knowledge U.S based investments and insurance, he aims to provide our clients with the finest experience in financial planning.

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 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.

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

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

Managed Portfolio Service

- Quarterly reviews of your portfolio
- Yearly in depth assessment of your overall financial plan and tax requirements
- 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 Niolas'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

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

"Skybound strives to maintain a reputation of 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.

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Senior Financial Advisor

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WEALTH MANAGEMENT

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