SO WHO IS

Nathan Tarr

Regional Director USA & Senior Financial Advisor

SKYBOUND

WEALTH MANAGEMENT

Helping To Secure Your Future.

Wherever You Are Today.

Nathan Charles Tarr BSc (Hons) ACSI

Regional Director USA & Senior Financial Advisor

As regional Director for Skybound Wealth Management USA, Nathan oversees both the East and West Coast offices, but is primarily based out of Miami, Florida. He has worked in financial services for over 16 years, and has extensive knowledge and experience in holistic financial planning.

Nathan is a member of the Personal Finance Society and the Chartered Institute for Securities and Investment which allows him to use the accreditation ASCI.

After graduating from The University of Wales Glamorgan, Nathan has worked for large international financial service companies in Cardiff, London, Frankfurt, Hamburg, Zurich, New York and Miami. He has built a strong reputation and has a high standard for delivering client service, together with a high level of knowledge and skill in financial planning.

Nathan Joined Skybound in June of 2017 where he opened and established the groups expansion into the US market based out of Miami, Florida. Here the focus will be on bringing Skybound's high levels of customer service and financial experience to the US market, helping expatriates and local residents with all their financial planning needs. Including the very niche area of dealing with UK pensions whilst resident in the US.

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.

Nathan 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.

Nathan Charles Tarr BSc (Hons) ACSI

Regional Director USA & Senior Financial Advisor

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 Investments

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 Nathan's clients.

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

Sean Calvert

Administrator

Sean, based in the UK, assists the Skybound USA team. His daily responsibilities include overseeing the administration of the cases brought by the Advisors. Since joining Skybound in October 2021 Sean has completed his MSc in Wealth Management.

Leanne Taylor

Administrator

Leanne has over 9 years' experience working in Financial Services, she joined the Skybound Team in May 2021 since then she has been supporting the USA team. Based in the UK, Leanne supports several US advisors in administration duties. Keen to continually develop, she is currently studying towards CII Level 4 diploma in Financial 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.

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 Director USA & Senior Financial Advisor

Michael Jordan

Senior Financial Advisor

Lewis Ringham

Senior Financial Advisor

Mark Langley

Financial Associate & UK Pension Specialist

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

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.

Helping To Secure Your Future.

Wherever You Are Today.

Nathan Charles Tarr BSc (Hons) ACSI

Regional Director USA & Senior Financial Advisor

200 S Biscayne Blvd
Suite 2930
Miami FL 33131

e: nathan.tarr@skyboundwealthusa.com
www.skyboundwealthusa.com

m: (347) 484 7178
t: (786) 408 7703

SKYBOUND
WEALTH MANAGEMENT

British American Business Council Miami