



SO WHO IS

Jake Murphy

Senior Financial Planner



SKYBOUND

WEALTH MANAGEMENT

Securing Your Future.

Wherever You Are Today.



Jake Murphy

Senior Financial Planner

After graduating with a BSc Honours from Cardiff University, Jake has gone on to complete Level 3 and 4 CISI qualifications in Securities and Investment and UK Regulation and Professional Integrity.

Since joining Skybound Wealth, Jake has been recognised for his professionalism, aptitude and work ethic, winning a global recognition award at our annual award ceremony in his first year. Since then he has been advising a diverse range of clients across Europe, Africa and Asia with particular expertise relating to offshore retirement planning and cashflow modelling for expatriates.

Jake has a passion for helping clients, understanding each individual's unique situation by utilising a logical, personable and honest approach to find the best solution. He has a great understanding of financial planning and investment strategy, working alongside clients to build a comprehensive plan to build and protect their finances whilst they work offshore.

SKYBOUND
WEALTH MANAGEMENT

Jake is fully qualified to advise in all areas of personal financial planning including:

- ⦿ Retirement Planning
- ⦿ Lifestyle Financial Planning
- ⦿ Income & Cashflow Planning
- ⦿ Pillar II & III Planning
- ⦿ Repatriation Advice
- ⦿ Domestic & International Investments
- ⦿ Regular and Lump Sum Savings
- ⦿ RSU's and Option Structures
- ⦿ Diversifying Portfolios and Risk Reduction
- ⦿ Situs Asset Transfers
- ⦿ Education Fee Planning
- ⦿ Critical Illness Cover
- ⦿ Asset and Insurance Protection
- ⦿ Life Insurance Cover
- ⦿ Inheritance Tax Planning

Managed Portfolio Service

Skybound's managed portfolio service is an exclusive, bespoke and tailored solution for private clients who wish to benefit from:

- ⦿ Access to External Discretionary Fund Management
- ⦿ Weekly market updates from your Portfolio Manager
- ⦿ 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
- ⦿ Capital Protected Investments

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 Wealth are always on hand to guide you through the important decisions required today, to ensure you 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 realise the future you always dreamed of.



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Meet Your Investment Specialists.



Jabir Sardharwalla

Skybound Capital Chief Investment Strategist

Jabir uses his decades of experience to provide economic and market insights and views, as well as general investment guidance. Prior to joining Skybound, he worked for Hasma Capital Advisors and Punter Southall Financial Management as Chief Investment Officer. Jabir is a graduate of the Warwick Business School and holds a degree in Accounting and an MBA.



Nikita Maxwell

Investment Operations Coordinator

Nikita holds a bachelor's degree specializing in portfolio management. She also holds a master's degree in Finance from the University of St Andrews and a CISI Level 3 qualification in International Certificate in Wealth and Investment Management. She joined Skybound Wealth in February 2021 and works out of the UAE office.



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 Jake's clients.

One Team. Multi-Expertise. Tailor-Made Solutions.

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.



Verity Winter

Business Development Manager

After completing her degree at the University of Southampton, Verity began her career as an Associate Financial Adviser, working with clients across global markets. She now specialises in international financial planning for expatriates. Since joining Skybound Wealth, she has focused on delivering tailored financial solutions aligned with clients' long-term goals. She is currently pursuing her CISI Level 3 qualification to further develop her knowledge and expertise.



Kane Keys

Associate

Kane is an accomplished associate in wealth management with a strong track record in client relationships and financial education. Having achieved his CISI Investment and Wealth Management Certificate, he is now working towards his Level 4 qualification. His commitment to exceptional service and deep market knowledge make him a valuable asset to Skybound clients.

What Jake's Clients Say...

James Bruce

Country Manager at ASCO Group

I had the pleasure of working with Jake recently and received exceptional financial advice. His expertise in financial planning and investment strategies is impressive. He provided clear, actionable advice that helped me reach the correct financial decisions for my long-term future.

Jake is not only knowledgeable but also a great communicator who fully understood my financial goals. I highly recommend him to anyone seeking professional financial guidance.

“

A true credit to himself and the company he represents.

Chris Gerber

**Advisory Board Consultant at Genesiss Consulting
& Advisory Services**

”

Keith O Leary

Electrical Supervisor at Fluor Group

Jake is a very welcoming, honest & trustworthy professional who works with integrity to provide his clients with sound financial advice and guidance. Jake's up to date expertise in the financial sector creates a trust that is rare to find. I would highly recommend Jake and his services and look forward to many more years working together.

Gillian Mitchell

CQV Clean Utilities Engineer at FUJIFILM Diosynth Biotechnologies

I can highly recommend Jake and the positive experience I've had working with Skybound and the services they provide. Jake is extremely knowledgeable as an advisor and was very helpful when it came to explaining what Skybound do and how I could benefit from their services. I would definitely recommend Jake.

Noor Schroeder

PSM Team Lead at SOCAR Polymer

I am incredibly grateful for the exceptional service provided by Jake Murphy at Skybound. Their expertise and personalized approach have not only helped me focus on my financial goals but also given me peace of mind about my future. They are always attentive, knowledgeable, and proactive, ensuring that my investments are well-managed and aligned with my objectives. I highly recommend their services to anyone seeking a trustworthy and effective financial advisor.

We exist to educate and guide you through the important decisions required today, to ensure you benefit from the freedom of tomorrow.

Jake Murphy

Senior Financial Planner

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