



# SO

who is Maximillian Gerstein?

Financial Advisor - Global Partners



**SKYBOUND**  
WEALTH MANAGEMENT

**Securing Your Future.**

Wherever You Are Today.



## Maximillian Gerstein

Financial Advisor - Global Partners

**Max Gerstein is a seasoned financial advisor with an exceptional track record spanning over five years. With a diverse professional background that includes working in prominent financial hubs such as Geneva and Dubai, Max has honed his expertise in navigating various jurisdictions and catering to a global clientele.**

Throughout his career, Max has cultivated a deep understanding of worldwide financial solutions to meet the unique needs of his clients. He has built a robust network of individuals and institutions across the globe, enabling him to provide tailored advice and strategies to clients from diverse backgrounds and regions.

As a trusted advisor, Max manages an extensive client base of over 500 individuals and businesses. With a portfolio exceeding \$30 million under his management, he consistently demonstrates a commitment to delivering personalized wealth management solutions and maximizing returns for his clients.

SKYBOUND  
WEALTH MANAGEMENT

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

- ⦿ Pension Transfers
- ⦿ Trust & Inheritance Tax Planning
- ⦿ Lifestyle Financial Planning
- ⦿ Retirement Planning
- ⦿ International Investments
- ⦿ Regular and Lump Sum Savings
- ⦿ Education Fee Planning
- ⦿ Health Planning
- ⦿ Asset and Lifestyle Protection

## Managed Portfolio Service

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

- ⦿ Discretionary Fund Management
- ⦿ Weekly market updates from your Portfolio Manager
- ⦿ Bi-annual 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?

Living as an international worker can take you to new and fantastic locations as you advance in your career. Experiencing new cultures and traditions, along with an increased earning potential allows you to secure the perfect future for their family for generations to come. But with change, comes challenges, Skybound Wealth believes that your financial planning should not be one of these challenges.

We deliver wealth management for life, globally - our combination of experience, global coverage and local knowledge means we are always on hand to guide you through the important decisions required today, to ensure you benefit from the freedom tomorrow brings.

The most important investment you'll ever make, isn't a stock or a share. It's your investment in time to take control of your financial future.



# Maximillian Gerstein

Financial Advisor - Global Partners



## 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 Analyst

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 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 AFI Personal tax and trust planning exam. She is able to use this knowledge for the benefit of Max'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.





## Adeeb Khan

### Global Partners Associate

Adeeb graduated in May 2019 with a double major in Economics and Finance from the American University of Sharjah. Coming from a reporting background, Adeeb specializes in providing in-depth analysis and reporting expertise to ensure that consultants have all the relevant information for their reviews. Working as an Associate for the Global Partners division, Adeeb has demonstrated an immense work ethic and an acute eye to detail; assets which make him an integral part to the team.



## Mohammed Kamil Khan

### Global Partners Associate

Kamil graduated in 2019 with a double major in Finance and Economics. As a promising member of the Global Partners division at Skybound Wealth Management, he supports advisors that specialize in servicing clients in all aspects of financial planning. Kamil brings a diverse skill set to the team with an aptitude for creating and analyzing reports that help the team with making important decisions, operating efficiently and managing tasks.



## Jenniezent Danas

### Administrator

Jenniezent has been supporting the Global Partners division since March 2019. Utilizing her years of experience in administration and executive secretarial management, she ensures smooth processing of changes and improvements being done for their clients' investments.



## Rachana Pillamari

### Global Partners Associate

Rachana graduated in May 2019 with a major in Finance. She specialises in analytical and organisational skills that have allowed her to enhance and mediate the client servicing aspect of the team. Being the first Associate of the Global Partners division, she strives to achieve clarity and delegate efficiently. Her Finance background enables the team to generate reports for constant performance feedback. Moreover, Rachana has played a pivotal role in proactively improving processes for the division.



## Jennylie Gutierrez

### Administrator

Jennylie graduated with a degree in Management Accounting in 2007 and has almost 10 years of work experience in customer service and administration. She joined Skybound Wealth Management in August 2017 as an Associate for Global Partners Team and has since been one of the main points of contact for administration and servicing needs.

---

## What Max's Clients Say...

---

“

*Working with him  
is always efficient,  
enjoyable and  
professional.*

”

### Predrag Vranjkovic

**Member of the Director General Cabinet**

When I was notified by Skybound that my financial advisor will change, I was concerned. Starting up an efficient new work relationship takes time. But with Max it really was so effortless. Thanks to his amazing communication skills, clarity of the advice, and always with a professional approach, Max made me feel comfortable and in good hands. Working with him is always efficient, enjoyable and professional. Thanks very much and keep it going.

### Gustavo Duarte

**Vice President and Executive Director, Nokia**

Max Gerstein is my advisor and I must say I am impressed with the work so far. His attention with my assets and follow-ups so far are impeccable...

### Brent Gormandy

**Senior Process Engineer, INEOS Energy**

No complaints about the service provided. My advisor Max Gerstein has provided me with good advice in how to diversify my investment portfolio to meet my goals. He is timely and follows up on things promised and always keeps me informed if there is a delay for one reason or another. He is also prompt at responding to emails..

---

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

**Maximillian Gerstein**

Financial Advisor- Global Partners

---

e: [max.gerstein@skyboundwealth.com](mailto:max.gerstein@skyboundwealth.com)

m: +971 543 913 069

w: [www.skyboundwealth.com](http://www.skyboundwealth.com)

t: +9971 4450 9700 EXT:9735

---

Mazaya Business Avenue,  
BB1 Tower, 2106, Jumeirah Lakes Towers,  
Dubai, UAE

---



**SKYBOUND**  
WEALTH MANAGEMENT

**Securing Your Future.**

Wherever You Are Today.