LONDON - GENEVA - DOHA - DUBAI

WHITEKNIGHT

WEALTH MANAGEMENT

www.whiteknightwealth.com

YOU WON'T WIN BY RESIGNING.

Strategy requires **thought**, **tactics** require **observation**.

Info@whiteknightwealth.com +44 1223 931550

Our Philosophy:

At WhiteKnight Wealth, our philosophy is centered around one core principle: your financial success is our paramount priority. We recognize that each individual's financial journey is unique, filled with diverse goals, aspirations, and challenges. With this understanding, we are dedicated to delivering personalized wealth management solutions that align precisely with your objectives.

Client-Centric Focus: Your financial goals and objectives are our top priority at WhiteKnight Wealth. We are dedicated to understanding your unique aspirations and challenges, tailoring our services to align perfectly with your needs.

Expectation of Success: We firmly believe that achieving your financial goals is not just possible but expected. Our team of experts is committed to leveraging their knowledge and resources to guide you toward realizing your financial aspirations.

Core Values: Transparency, integrity, and accountability are the pillars of our approach. We prioritise open and honest communication with our clients, ensuring you are always empowered to make informed decisions.

Partners in Prosperity: At WhiteKnight Wealth, success is measured by the fulfillment of your dreams and aspirations, not just financial gains. We take pride in being your trusted partner on the journey to financial prosperity, working tirelessly to help you achieve your goals.

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WHAT SETS US APART

The Appraoch

• Personalised: We take the time to understand your unique financial situation, goals, and risk tolerance, crafting customised strategies that reflect your individual needs and preferences.

• Comprehensive Services: From investment management and retirement planning to estate planning and tax optimisation, we offer a full spectrum of wealth management services to address every aspect of your financial life.

• Experienced Team: Our team of certified financial planners, investment advisors, and wealth management professionals brings decades of combined experience and expertise to help you navigate today's complex financial landscape.

• Commitment to Excellence: We are dedicated to delivering exceptional service and superior results, continuously monitoring and adjusting your financial plan to adapt to changing circumstances and market conditions.

Whether you're just starting to build your wealth or looking to preserve and grow what you've already accumulated, WhiteKnight Wealth is here to serve as your trusted partner on the path to financial prosperity. Contact us today to schedule a complimentary consultation and take the first step toward a brighter financial future.

THE DIRECTOR'S *Message*

Dear Friends and Investors,

I extend a warm welcome to you on behalf of WhiteKnight Wealth. As the Director of our esteemed offshore wealth management firm, I am honoured to share our commitment to empowering you on your financial journey, regardless of your location.

At WhiteKnight, we understand the significance of trust and reliability when it comes to managing your wealth across borders. With this understanding at our core, we have assembled a team of seasoned professionals dedicated to providing personalised service and strategic guidance tailored to your unique needs and aspirations.

Our philosophy is simple yet profound: your financial success is our primary goal. We believe in forging enduring partnerships built on transparency, integrity, and a relentless pursuit of excellence. Whether you are preparing for retirement, securing your family's future, or aiming to grow and protect your assets offshore, our comprehensive suite of services is designed to support you at every stage of life, regardless of where you reside.

Warmest regards,
Joshua Jones
CEO, WhiteKnight Wealth

VISION & *Mission*

Our vision is to redefine what it means to achieve financial success. We envision a future where every individual has the knowledge, resources, and support they need to realize their financial aspirations and build a secure future for themselves and their loved ones.

We strive to be pioneers in the wealth management industry, setting new standards of excellence and innovation. Our vision is to empower our clients with personalised strategies and expert guidance that enable them to navigate the complexities of the financial landscape with confidence and clarity.

Ultimately, our vision is to be more than just a wealth management firm. We aspire to be a trusted partner, a beacon of guidance, and a catalyst for positive change in the lives of our clients and the communities we serve. Together, we can redefine financial success and build a brighter future for generations to come.

OUR
Services

WhiteKnight Wealth offers a comprehensive range of services tailored to meet your unique financial needs:

Retirement and Pension Planning: Secure your financial future with our expert retirement and pension planning services. We'll help you navigate the complexities of retirement savings, ensuring a comfortable and stress-free retirement.

Investment Advice: Benefit from our seasoned investment advice, encompassing portfolio management, IPOs, mergers, and acquisitions. We'll help you build and manage a diversified investment portfolio designed to achieve your financial goals while minimizing risk.

Estate Planning: Prepare for the future with our estate planning services, covering inheritance and capital gains. Safeguard your assets and ensure they are distributed according to your wishes, minimizing tax implications and maximizing benefits for your loved ones.

Financial Planning: Plan for life's milestones with our comprehensive financial planning services. From children's education funds to offshore banking and long-term planning, we'll work with you to create a customized financial strategy that aligns with your aspirations and priorities.

At WhiteKnight Wealth, we're committed to providing you with the guidance, expertise, and support you need to achieve financial success. Let us be your trusted partner on the path to a brighter financial future.

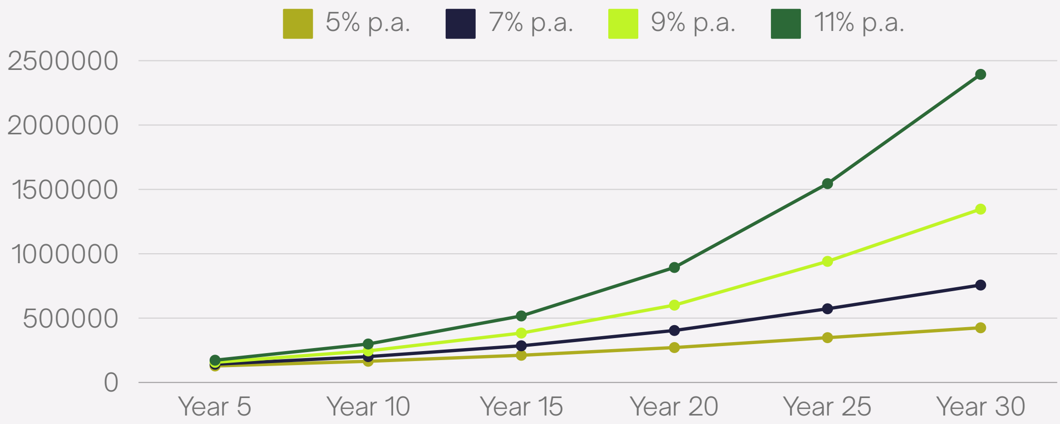
Investing entails risks, including the possibility of losing part or all of your investment. Market volatility, liquidity constraints, interest rate fluctuations, and foreign exchange risks are factors that may affect investment values. Past performance is not indicative of future results. Diversification strategies may not fully mitigate risk. It's crucial to assess your risk tolerance and investment objectives carefully. Consultation with a qualified financial advisor is recommended.

WHAT REALLY MATTERS

Growth

The below examples demonstrate the power of compound interest over time, highlighting how even small differences in annual interest rates can lead to substantial differences in the value of your investment over the long term. Note: Investment performance is not guaranteed.

Based on a £100,000 initial investment



Year	5% p.a.	7% p.a.	9% p.a.	11% p.a.
5	£128,335	£141,762	£156,568	£172,891
10	£164,700	£200,966	£245,135	£298,914
15	£211,370	£284,894	£383,804	£516,798
20	£271,264	£403,873	£600,915	£893,501
25	£348,129	£572,541	£940,841	£1,544,788
30	£425,029	£756,931	£1,346,725	£2,393,801

Choosing the right company for your investment needs is crucial, as demonstrated by the significant differences in potential returns based on varying interest rates. A company that can offer higher returns, such as those yielding 9% or 11%, could substantially increase the value of your investment over time compared to one offering lower returns.

By selecting a reputable and reliable company with a track record of delivering strong performance, you can maximise the growth potential of your investment and work towards achieving your financial goals more effectively. Making the right choice now can make a substantial difference in your long-term financial success.

MEET

The Team

Hope Salarda

Back Office Manager

My role is to make sure the company is running as well as it possibly can. I ensure a smooth, efficient service that meets the expectations and needs of management and staff.

Jamie Murgatroyd

Lead Financial Advisor

As the Lead Financial Advisor, I serve as the primary point of contact and leader within our financial advisory team. My role encompasses a wide range of responsibilities, including overseeing client relationships, providing personalised financial guidance, and developing strategic investment plans.

Compliance Team

I play a critical role in ensuring that our firm adheres to all relevant laws, regulations, and industry standards. My responsibilities encompass overseeing and implementing compliance policies and procedures, conducting internal audits and reviews, and staying abreast of regulatory developments.

Joshua Jones

Private Client Advisor

As a Private Client Adviser at our firm, I specialize in crafting tailored wealth management strategies for high-net-worth individuals, leveraging expertise in investment and financial planning to ensure the growth and preservation of their assets.

Charity Lindenberg

Head Paraplanner

As a Paraplanner, my role involves providing essential support to financial advisors within our firm. This support encompasses various tasks, including conducting in-depth research on financial products and markets, preparing detailed reports, and analyzing complex financial data.

James Walker

Operations Manager

My responsibilities encompass a diverse range of tasks, including managing administrative staff, coordinating schedules and appointments, and overseeing facilities and equipment maintenance. Additionally, playing a key role in implementing office policies and procedures, managing budgets and expenses, on top of managing the communication between departments.

Chris Williams

Senior Business Development Lead

Leveraging market research and analysis, I develop targeted strategies to penetrate new markets and industries, positioning our firm as a leader in the field. Additionally, I collaborate closely with cross-functional teams to develop innovative solutions and offerings that meet the evolving needs of our clients. With a proactive approach and a focus on results, I am committed to driving sustainable growth and delivering value to our clients and stakeholders.

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OUR **Contacts**

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