



Wimbledon
Wealth

GAME.
SET.
ADVICE.



WELCOME TO **Wimbledon Wealth**

With offices in both Dubai and the UK, Wimbledon Wealth is a boutique Wealth Management firm specializing in providing bespoke wealth management solutions for high-net-worth (HNW) and ultra-high-net-worth (UHNW) individuals. With a focus on delivering tailored strategies to grow, protect, and preserve significant wealth, we understand the complexities and unique needs of our distinguished clients.



**Wimbledon
Wealth**

The Value of Holistic Financial Planning

At Wimbledon Wealth, we understand that financial success isn't just about growing your assets; it's about creating a secure, balanced, and prosperous future. Holistic financial planning is a comprehensive approach that considers every aspect of your financial life—from investments and taxes to retirement and legacy planning.

We create a long-term plan for success, whilst preparing for any potential bumps along the way. Our personalized approach ensures that all elements of your financial plan work together seamlessly, offering you a roadmap to reach your goals.

Why choose Wimbledon Wealth?

Bespoke Solutions: We don't believe in one-size-fits-all. Every plan we create is personalized to meet your specific financial goals, priorities, and life circumstances.

Cross-border Expertise: With offices in Dubai and the UK, we are uniquely positioned to offer seamless wealth management strategies that bridge the best of both worlds.

Comprehensive Approach: From wealth management to tax planning, retirement strategies, wills, and insurance, we offer a full suite of services to safeguard your financial future.

Transparent & Trustworthy: We pride ourselves on our transparency and open communication. Our clients trust us to act in their best interests at all times.

Global Perspective: Whether you plan to retire in the UAE, return to the UK, or relocate elsewhere, we offer global solutions designed to cater to your international lifestyle.

A Team You Can Trust: We are an experienced team of Chartered Wealth Managers, having worked in both the UK and UAE. We know the solutions to your problems with your best interests at heart.

Meet the CEO

Sophia Bhatti is a distinguished figure in the wealth management sector, with a proven track record in investment advisory, tax-efficient structuring and legacy planning. With experience at HSBC, Lloyds and Barclays prior to setting up her own practice in Dubai, Sophia has built Wimbledon Wealth into a firm synonymous with precision, discretion and excellence.

- Chartered Financial Professional with extensive international experience.
- Active member and chairperson of leading global financial societies such as the YP Club and Business Network International.
- Recipient of industry awards for expertise in wealth management from institutions such as Which Financial Advisor (UAE).



Our Services



Wealth Management & Financial Planning

Holistic financial planning is at the heart of everything we do. We work with you to assess your current financial situation, define your future goals, and create a strategic plan that covers all areas of your financial life, including investment management, tax planning, retirement, and estate planning.



Retirement Planning

Whether you're planning to retire in Dubai, the UK, or elsewhere, Wimbledon Wealth can help you create a strategy that ensures you have the financial resources you need for a comfortable retirement.



Inheritance Tax (IHT) Planning for expats

Navigating the complexities of UK IHT laws for expatriates, ensuring your estate is structured to minimise liabilities and maximise intergenerational wealth transfer.



Trust planning & advice

Expert guidance in structuring trusts to safeguard assets, ensure seamless estate succession, and maintain privacy whilst protecting family wealth.

Our Services



Insurance Solutions

From life insurance to critical illness coverage, we offer a comprehensive range of insurance products to protect you and your loved ones in unforeseen circumstances.



Will Writing

To ensure your wealth is distributed to your loved ones as per your wishes, our Wills service can ensure your family are looked after when you are no longer here.



Mortgage Solutions

You can now make your property dreams come true in the UAE with our in-house mortgage service, offering you competitive rates without the hassle of dealing with banks.



Cashflow Modelling


Providing clients with a clear financial roadmap, simulating future wealth scenarios, tracking projected growth and ensuring that long-term financial objectives remain achievable.

Get in touch

At **Wimbledon Wealth**, we are here to help you achieve your financial aspirations. Whether you are looking to grow your wealth, protect your legacy, or plan for retirement, we are your trusted partner every step of the way.

DUBAI OFFICE

 Office 702, Al Habtoor Business Tower, Dubai Marina, Dubai, UAE

 +971 4 837 2200 (Phone)
+971 50 102 7966 (WhatsApp)

 info@wimbledonwealth.com

UNITED KINGDOM OFFICE

 City Pavilion 8th Floor Cannon Green, 27 Bush Ln, London EC4R 0AA, United Kingdom

 07775 701 072 (WhatsApp)

FOLLOW US ON SOCIAL MEDIA:

 [Wimbledonwealth](#)

 [wimbledonwealth](#)

 [wimbledon-wealth](#)

 www.wimbledonwealth.com



**Wimbledon
Wealth**