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# *Kingswood Partnership Opportunity*

December 2024



# First Step Towards A Seamless Succession

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Capitalize on market trends and secure the next step for your legacy

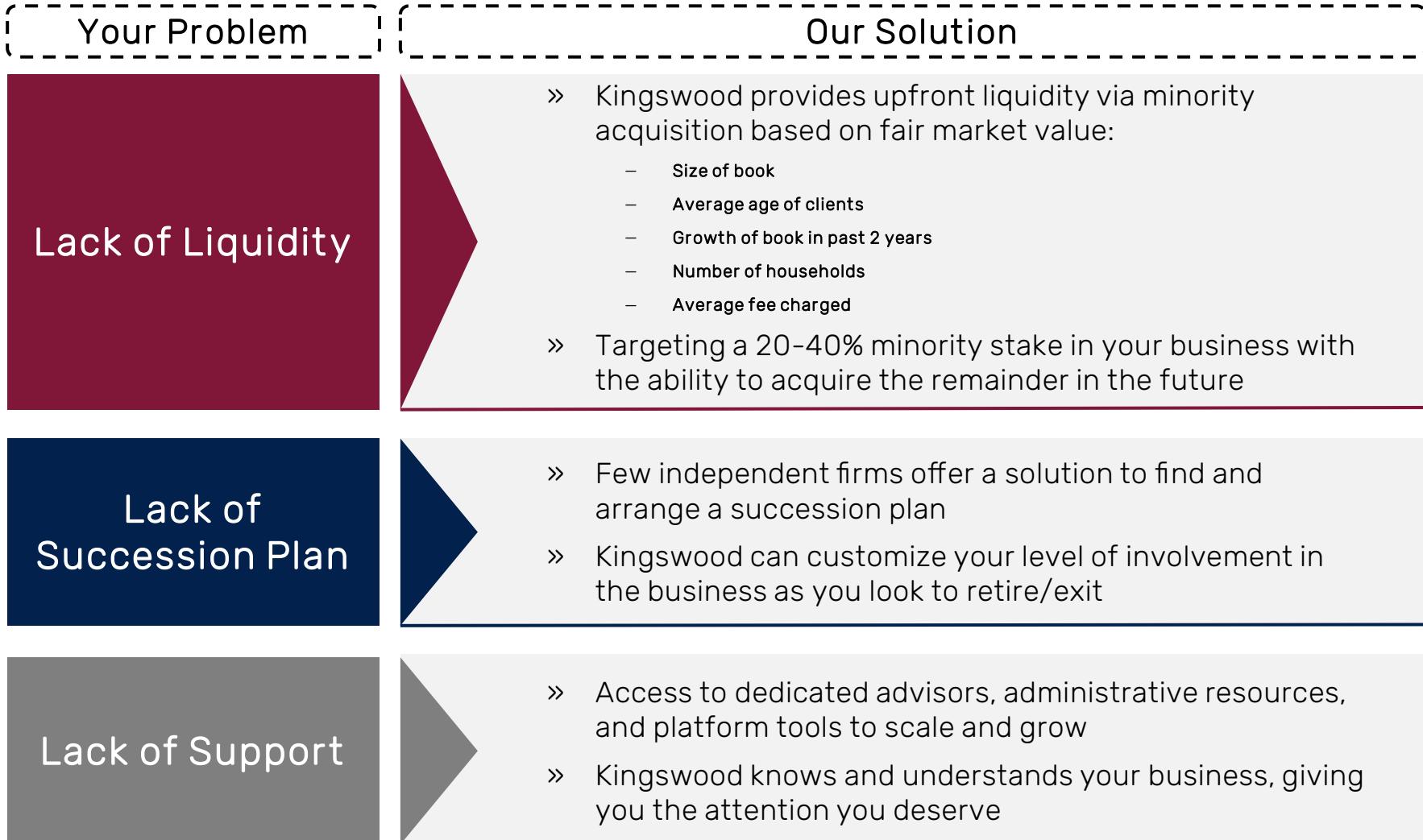
- > With Kingswood's expertise in the independent space, **we understand your business** and its challenges
  - 37% <sup>(1)</sup> of advisors look to retire over the next 10 years with many unsure of how to successfully transition their business
  - Planning for succession requires more than having someone next in line; we know your clients need to trust who is next
- > With many uncertainties that come with life, **Kingswood can preserve your legacy and business**, serving clients with the same level of service you have provided them
- > Kingswood now has the opportunity to **directly partner with you and acquire a minority stake (20-40%) in your business**, with the plans to acquire the rest when you are ready retire

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<sup>(1)</sup> Cerulli Associates.

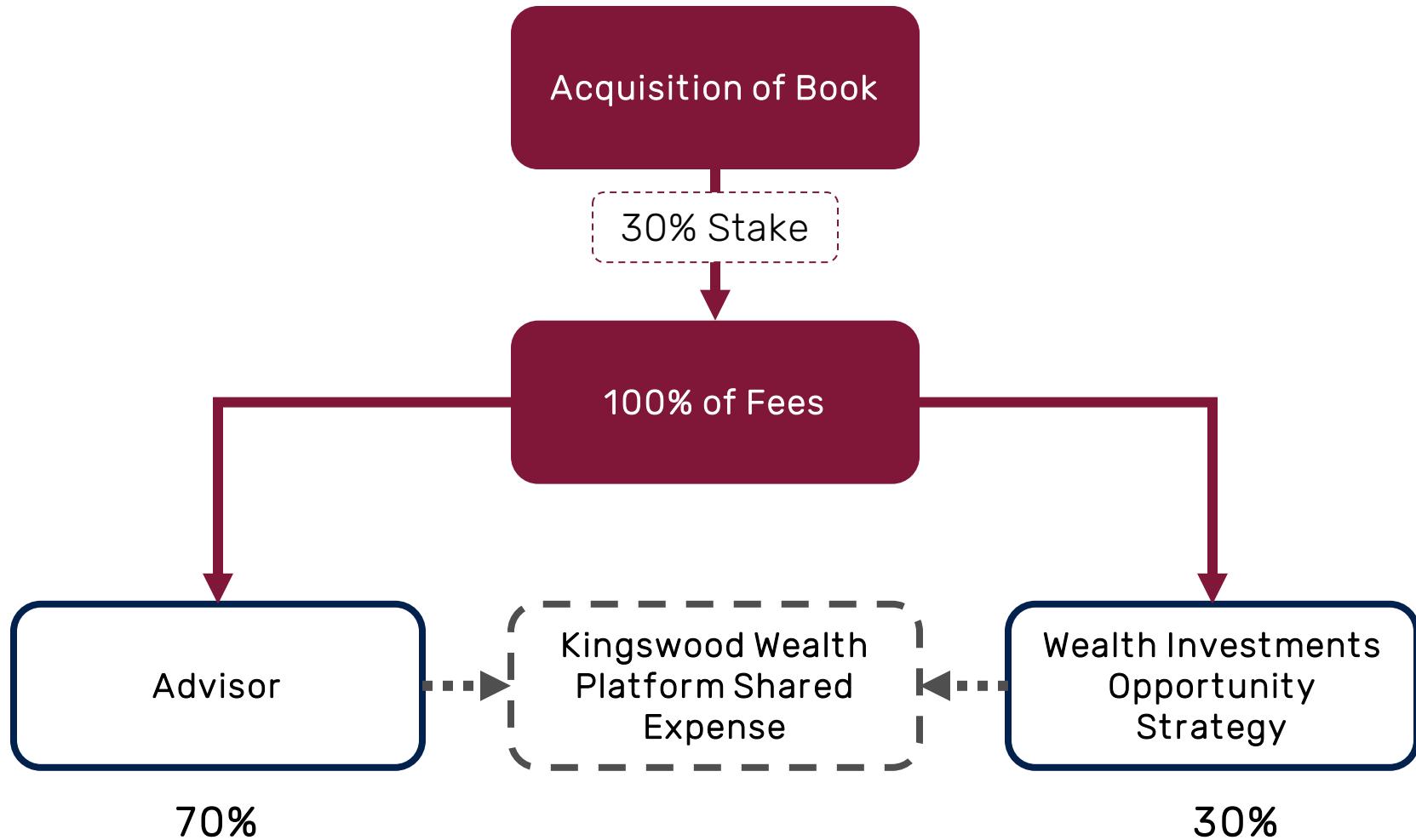
# Solutions Through Partnership

With an intimate understanding of your business, Kingswood provides a tailored solution



# Case Study: Minority Stake Acquisition

Illustrative acquisition of a minority stake in a book of business



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