



Kingswood Announces New Florida Corporate Office and Wealth Management Team

We hope you saw our [recent announcement](#) about our new Wealth Management Team and Office in Boca Raton. Please join us in welcoming Brian Herman and his team to the Kingswood Family.

Brian - a veteran investment banker, who oversaw dozens of IPOs and countless other transactions at ViewTrade Securities, where he specialized in servicing companies in global emerging markets as well as various high-growth U.S. middle-market sectors - joins us as the Managing Director of Investment Banking and Capital Markets. He and his team his team are expanding Kingswood's wealth management proposition by delivering on their knowledge of a deep bench of products available on Kingswood's full-service platform, and will continue to offer a full range of investment banking services.

Kingswood CEO and Managing Partner Mike Nessim is thrilled about the deal. "Our new corporate office in Florida marks an important milestone in Kingswood's growth, and demonstrates our commitment to expanding our wealth management proposition in multiple states. Our ability to give advisors integrated access to a wide range of financial and investment products at the corporate level will provide them with another edge in wealth management, as they grow their books of business."

More information about our new Investment Banking and Capital Markets group and how they can help you deliver more to your clients will be coming in the weeks and months to come. In the meantime, please feel free to reach out and welcome Brian Herman via email at bherman@kingswoodus.com.

M&A Advisory Services Available Through Skyway Capital Markets



If you have clients who own small- to medium-sized businesses and need help figuring out how to take it to the next level or begin transitioning out of it, Kingswood can help. We can introduce you to the investment banking team at Skyway Capital Markets, LLC - a full-service, industry agnostic, boutique investment bank that specializes in M&A advisory services, among other solutions. The Skyway team will guide you and your client through every step of the M&A process, strengthening the existing relationship and growing assets under management. To learn more, please contact Ryan Sabet at rsabet@kingswoodus.com

New to the Kingswood Alternatives Platform: InCommercial, Inc.

CEO and Managing Partner Mike Nessim and Managing Director of Investments Douglas Blake recently wrote an article for Digital Wealth News - [Clients Crave Alternative Investments, Make Sure They Have Access to the Right Ones](#) - in which they discuss the changing alts landscape, and the importance of working with a firm with an alts program that fits your business.



To that end, Kingswood is pleased to announce that InCommercial, Inc. - a full-service real estate fund manager, property manager and brokerage company - was recently added to our Alternatives Platform. InCommercial manages over 250 single tenant properties, shopping centers, office buildings and medical centers across the country and transact as a principal on over 80 such assets every year. InCommercial's mission is to deliver superior service and quality, specialized, investment real estate services with a straightforward and pain-free experience.

To learn more, please visit their website: incommercialre.com. To learn more about the Kingswood Alternatives Platform, please contact Douglas Blake at dblake@kingswoodus.com.

Repertoire Training Replays Available



Repertoire is a workflow tool that allows you & your team to view data entered into the back office. It allows you to view commission statements, print reports, view clients, and even renew your annual state registrations.

Repertoire has hosted two successful, interactive training sessions, and plans to host more in the future. You can access the replays of each session by clicking on either of these links:

- [Repertoire Overview Training Session](#)
- [Repertoire Money Movement Training Session](#)

These videos and other training materials are also available in the "How To..." Training Library on our new website for advisors and their teams, welcometokingswood.com.

For questions about Repertoire, please contact Carlos Yearwood at cyearwood@kingswoodus.com or Eddie Kazatsky at ekazatsky@kingswoodus.com.

PR Opportunity: Provide Quotes in Industry Publications

Industry publications often turn to us for quotes to support articles. We'd like to provide Kingswood Advisors with opportunities to be quoted in the press. We will notify you if your quote is selected, and will share the article on our LinkedIn page, tagging you to grow your audience. If you are willing to provide your insight (usually on an ASAP basis), please email Ryan Sabet at rsabet@kingswoodus.com.

Kingswood in the News

Keep up with the latest from Kingswood U.S. by visiting our [website](#) or following us on [LinkedIn](#) and [Twitter](#).

Here are a few links to recent coverage of our company and advisors:

- [Kingswood U.S. Announces Opening of Florida Corporate Office To](#)

[House New Wealth Management Group- via Cison/PR Newswire](#)

- [Transitions, Transactions & Promotions, January 2023](#) - via *Wealth Solutions Report*
- [2022 saw an annuity explosion: Limra](#) - via *InvestmentNews*
- [Super Bowl special: How to leave NFL tickets to heirs without getting sacked](#) - via *InvestmentNews*
- [Plan sponsors, participants agree on value of guaranteed income options](#) - via *InvestmentNews*

Please join Kingswood in supporting
A Friend's House Tiny Home Initiative
Contact Ashley Webb (awebb@kingswoodus.com)
to learn more and/or donate



Contact Your Concierge Team Today!

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As always, please reach out if you have questions or if we can be of service to you.

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Securities Offered through Kingswood Capital Partners, LLC Member FINRA/ SIPC. Advisory Services offered through Kingswood Wealth Advisors an SEC registered investment adviser.

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