



M&A and Succession Planning in Times of High Inflation and Rising Interest Rates



In speaking with many of our advisors, we have recently heard a consistent theme of uncertainty around whether and/or how they should build, modify and/or move forward with their succession or acquisition strategies given rising interest rates and high inflation. Some are wondering if they should delay retirement until the market eventually corrects. CEO and Managing Partner Mike Nessim recently wrote an article for *InvestmentNews* that offers valuable insight and information about the M&A and succession process for advisors to take into consideration in this economic environment. You can read the full article [here](#).

If you and your firm are ready to develop a succession plan or are perhaps considering an acquisition, Kingswood has resources to help guide you through this process. Please reach out to Ryan Sabet (rsabet@kingswoodus.com) to learn more.

Where to Direct Banking and Advisory Inquiries

We are continuously working on improving processes across the enterprise. Thus, effective immediately, please submit all banking and advisory inquiries directly to banking@kingswoodus.com.

New Clearing Partner: APEX Clearing

We are proud to announce a new clearing platform is available to Kingswood advisors. [APEX Clearing](#) - part of [APEX Fintech Solutions](#) - is an award-winning first mover in the clearing and custody space. APEX has digitized many of the manual processes, helping to make our advisors' experience more efficient. In addition, APEX can provide a way for a client to process their own transactions. Clearing through APEX may also be a way for Kingswood advisors to attract the next generation of young investors who prefer a more digitized experience - It takes around five minutes on average to open and fund an account via the APIs implemented by APEX.

To learn more or get started, please contact Eddie Kazatsky (ekazatsky@kingswoodus.com).

Marketing Support Available from FMG

Increasing your client engagement comes down to more frequent, proactive communication. And one marketing channel doesn't cut it; clients want regular touches from multiple channels. That's where FMG comes in with tools to seamlessly send timely, relevant, and authentic content through email, social media, and event printed greeting cards. To learn more about how FMG can help you with your marketing, please visit their website, or download their [Marketing Flyer](#). To get started, please call FMG Sales at 858-251-2420. Be sure to mention you are a Kingswood advisor to receive special discounted rates.

You can also access these - and other partner materials - in the "How To" Training Library on our new resource exclusively for Kingswood advisors and their teams, welcometokingswood.com.

Alternative Spotlight: Hamilton Point Investments



Hamilton Point Investments LLC ("HPI") is a real estate private-equity investment company that owns and manages multifamily apartment properties, manufactured housing communities and hotels. HPI invests through a series of real estate private-equity investment funds raised from individual accredited investors through a selling group of independent broker-dealers and registered investment advisors.

To learn more about Hamilton Point Investments, please visit their [website](#). To learn more about the Kingswood Alternatives Platform, please contact Managing Director of Investment Services Douglas Blake (dblake@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 our recent coverage:

- [Banking & Finance Tracker: Kingswood U.S. opens Boca Raton corporate office](#) - via *South Florida Business Journal*
- [Drop in housing market has retirees seeking shelter](#) - via *Investment News*

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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