



Kingswood Elite Conference - Puerto Rico

Earlier this month, we brought together some of our elite advisors for three days of learning, networking and fun at the Kingswood Elite Conference Series in Rio Grande, Puerto Rico. Thank you to everyone who attended, and to our sponsors for making this event possible.

The Kingswood Conference Series - Scottsdale will be held in Arizona at the Fairmont Princess Scottsdale on November 27 - 30. Look for more information later this summer.

Thank you, Sponsors!



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Insurance Should Be an Important Part of Any Financial Plan



Mike Nessim and Douglas Blake recently spoke with AdvisorHub about the role insurance can play in investment portfolios and the importance of working with an insurance-licensed financial planner to craft a holistic wealth plan. As the article is written for investors, you might find it useful to send to clients who need more education about insurance and how it can add value to their overall wealth plan. You can access and read the article [here](#).

REMINDER: Procedure for Deposits into Client RIA RBC Accounts

A few quick reminders on requirements when a client would like to deposit a check into their RIA RBC account. RBC has become increasingly strict and we have even seen them reject a few checks recently due to not being made out correctly. Please read the below carefully!

Checks may be made out as below for deposit into their RIA accts:

- Checks made payable to RBC Capital Markets, LLC
- Checks made payable to RBC Advisor Services
- Checks made payable to RBC Clearing & Custody
- Checks made payable to abbreviations such as RBC CM, RBC AS, RBC C&C

Please ensure all checks are sent to the Stockbridge office for deposit.

Kingswood U.S.

175 Country Club Lane

Building 400, Suite D

Stockbridge, GA 30281

Checks sent directly to RBC have a high probability of being lost/never deposited or coded incorrectly.

Please contact Ashely Webb (awebb@kingswoodus.com) if you have any questions.

Your Secret Weapon - The Kingswood Sales Administration Team

Do you need additional help streamlining your back office efforts? The Kingswood Sales Administration Team is here to help! For \$50/hour, you can have access to a dedicated Kingswood service rep to help with almost any back-office task. If you or someone on your team needs assistance from the Sales Administration Team, please email us at salesadmin@kingswoodus.com.

Thank You for Supporting A Friend's House

We are thrilled to announce that the Kingswood community collectively raised and donated over \$100,000 last year to support [A Friend's House](#)! Our work and partnership continues - we are hosting an end-of-school-year party with a bouncy waterslide and a food truck for the kids, and continue to raise money to support the Tiny House Initiative. As always, Kingswood will match any donation made through us dollar-for-dollar. To learn more or to make a donation, please reach out to Ashley Webb (awebb@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:

- [Insurance should be an important part of your financial plan](#) - via *AdvisorHub*
- [Wide gaps exist between retirement plans, employee needs: Transamerica](#) - via *Investment News*
- [Business Development Roundtable: Tech, Compliance & Wealth Management](#) - via *Wealth Solutions Report*

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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