



A Friend's House Update

We hope you saw the recent press release announcing that, together, we raised more than \$100,000 to support A Friend's House last year. Thank you to Ashley Webb for leading the charge on our behalf, and please join us in congratulating her on being elected to their Board of Directors!

On June 6th, Kingswood sponsored the "End of School Bash" for the youth at A Friend's House! The event featured a bouncy waterslide, a chicken and waffles food truck and a snow cone truck. The kids had a great time and were really excited about everything! We also celebrated a huge milestone for two residents - high school graduation. We are so proud to be part of their story!

There is more work to be done! Kingswood will continue to match donations made to A Friend's House through us. To learn more or make a donation, please contact Ashley Webb (awebb@kingswoodus.com)

Optimize Your Cash and Short Term Investments

Available only at Assetmark Trust Company, Complete Cash Solutions give you the opportunity to attract additional assets and provide your clients with cash solutions to meet their growing and changing needs. Click on "Download File" below to view a flyer with details on specific cash solutions they have available.

Please reach out to the AssetMark Sales Team to learn more.

CORRECTION to Kingswood Sales Administration Team Hourly Rate

In our last newsletter, we stated incorrectly that Kingswood Advisors could leverage the Kingswood Sales Administration Team for \$50/hour. The correct rate for the Sales Administration Team is \$75/hour.

If you or someone on your team needs assistance from the Sales Administration Team, please email us at salesadmin@kingswoodus.com.

New Foreign Currency Wire Vendor for RBC Clearing and Custody

As communicated in May, RBC Clearing and Custody is changing from RBC Investor Service Bank in Luxembourg to Wells Fargo Bank for processing incoming and outgoing foreign wire transfers. Because Wells Fargo is a U.S.-based bank, the change will mean expanded customer service availability during business hours.

New Incoming Wire Exchange Instructions can be found on the RBC Gateway website. If you have questions, please contact the Wire Transfer department at 833-657-2296, option 3.

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:

- [Kingswood U.S. Raises More Than \\$100,000 for Nonprofit in Greater Atlanta Area](#) *via PR Newswire*
- [529 Day is a reminder to not play hooky saving for your kids' education](#) - *via Investment News*
- [The annuity industry eyes another record year after 2022's grand slam performance](#) - *via Investment News*

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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!

Eddie Kazatsky
(201) 815-3595 | ekazatsky@kingswoodus.com

Rifton Westby
(845) 544-6300 | rwestby@kingswoodus.com

Ryan Sabet
(516) 315-6596 | rsabet@kingswoodus.com

Jaime Golden
(917) 696-8657 | jgolden@kingswoodus.com

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

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