

## Kingswood July Newsletter

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Mon 1/22/2024 12:57 PM

To:Jakie Beard <jakie@advisorpedia.com>



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## Employee Benefits Available Through Paychex



We are pleased to partner with Paychex to help deliver employee benefits to our registered reps:

- Vision
- Dental Insurance
- Life Insurance
- Disability Insurance
- Health Insurance
- 401(k) and retirement

Please book a day/time via Calendly to review the PEO program for Kingswood advisors and start your company's process:

<https://calendly.com/oasis-peo/kingswood>

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## New Philanthropic Partner: Skull Games

[Skull Games](#) operates on a global scale to identify and restore victims of sexual exploitation and deliver justice to traffickers and sex predators. They work to free people from their suffering and interrupt the cycle of abuse for future generations.

Kingswood is proud to support the Skull Games Mission to use Open Source Intelligence (OSINT) to identify victims of sexual exploitation, the predators abusing them, and other Persons of Interest by creating leads that enable law enforcement to interrupt the cycle of abuse and



restore survivors of trauma to a life of hope,  
healing, and freedom.

To learn more about our support of the Skull  
Games or to join us in making a donation, please  
contact Ryan Sabet at [rsabet@kingswoodus.com](mailto:rsabet@kingswoodus.com).

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## Save the Date - November 27 - 30 Kingswood Conference Series - Scottsdale



The Kingswood Conference Series - Scottsdale will be held November 27-30 at the Fairmont Scottsdale Princess in Scottsdale, Arizona. Ashley Webb will be contacting Kingswood reps in September to confirm attendance and travel arrangements. We will be publishing more information about the agenda and speaker lineup this fall.

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## Alternative Spotlight: Eagle Point Credit Management



Eagle Point was founded in 2012 by Thomas Majewski and Stone Point Capital. Eagle Point manages capital on behalf of institutional, high-net worth and retail investors through private funds, separately managed accounts and publicly-listed closed-end vehicles.

To learn more about Eagle Point Credit Management, please visit their website. To learn more about the Kingswood Alternatives Platform, please contact Managing Director of Investment Services Douglas Blake ([dblake@kingswoodus.com](mailto:dblake@kingswoodus.com)).

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## Podcast: Opportunities in the CLO Market with Daniel Ko

In this episode of Wall & Main, Doug Blake is joined by Principal and Portfolio Manager of Eagle Point Credit Management, Daniel Ko. Doug and Dan talk about the interesting CLO (Collateralized Loan Obligation) marketplace.

You can listen to the podcast and subscribe to Wall & Main [here](#).



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



## 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:

- [Warnings from financial advisors grow with Mega Millions jackpot - via InvestmentNews](#)

## 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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