



KINGSWOOD

PROTECT AND GROW YOUR WEALTH



Kingswood U.S. Adds More Than \$610 Million with Recruitment of Nine Financial Advisors

We are honored and proud that the following advisors and their teams have joined the Kingswood U.S. Family this year:

- Rob Brewer
- Michelle Cavallero
- Blake Fowler
- Frank Hsin
- Chris Kemper and Melissa Miller
- David Morris
- Andrea Swope
- Joseph Wainer
- Andrea Whitmire

These newest members of the team are highly experienced advisors offering services in financial planning, asset management and qualified retirement plan support across the United States. Please join us in welcoming them and celebrating our continued growth!

Kingswood Capital Partners Recognized in IBD Elite 2023



We were thrilled to be recognized by Financial Planning in their IBD Elite 2023 Survey. This annual survey of the largest independent broker-dealers in wealth management contains data on 45 firms that generated more than \$41 billion in combined revenue in 2022.

Here's how Kingswood Capital Partners ranked:

- # 3 for Financial Advisor Payout
- # 4 for Highest Growth in Producing Reps
- #22 in Total Revenues

You can access a PDF of the survey and read the related cover story, "What The Heck is an OSJ?" by clicking [here](#). To learn more about becoming a Kingswood Advisor, please contact Ryan Sabet (rsabet@kingswoodus.com)

Kingswood Conference Series - Scottsdale

Invitations went out earlier this month for the Kingswood Conference Series - Scottsdale. This year's event is November 27 - 30 at the Fairmont Scottsdale Princess. If you have not yet replied to your invitation, please contact Ashley Webb (awebb@kingswoodus.com) as soon as possible so she & her team can get your travel arrangements confirmed. We hope to see you there!



Kingswood Partner Spotlight: RBC BLACK



RBLACK is the first custodian-driven financial professional platform that successfully integrates four world-class independent financial technology solutions (Redtail, Riskalyze, MoneyGuide and CircleBlack) into one fully integrated technology suite, supported by one of the largest clearing and custody firms in the United States, RBC.

You can view a demonstration of the platform [here](#). To learn more or to get started, please contact RBC directly (c&ctechconsulting@rbc.com) or Nicki English (nenglish@kingswoodus.com).

[Download the RBC BLACK Flyer](#)

Kingswood Philanthropic Update: A Friend's House



Just a quick update on our charity partnership with A Friend's House and the awesome improvements that have been funded with your generous support!

Thanks to your donations A Friend's house now has academic rooms on each side for the boys and girls, indoor and outdoor chill zones, new washers and dryers and a half pipe skate ramp!

The boys previously had no access to an outside area of their own, now they have the skateboarding ramp on their side and can easily get some fresh air and physical activity. The second photos shows the girls' outside chill zone. They planted flowers and even installed some really pretty solar lights that look like flowers and butterflies at night when they glow.

These improvements help the children in A Friend's House have a little more normalcy in the not-so-normal situation they are all in. To make a donation to help raise funds to a Friend's House please reach out to Ashley Webb (awebb@kingswoodus.com). Kingswood is still matching all donations dollar for dollar!

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:

- [IBD Elite 2023: Deep dive into independent wealth manager data](#) - via *Financial Planning*
- [Kingswood U.S. Furtherers the Strategic Expansion of its In-House Investment Banking Group With Appointment of Craig Kaufman](#) - via *PR Newswire*
- [Advisors debate: ETFs, mutual funds, or both](#) - via *InvestmentNews*

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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Kingswood U.S.

17 Battery Park Place, Suite 625

New York, NY 10004

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