

Goldilocks was Right: Advantages of Affiliating with a Mid-Size Firm



As a financial advisor, changing firms is one of the most consequential business decisions you can make. The disruption to your practice, your clients and your income stream can be dramatic. The downsides of making a transition are well known and can often result in a sort of paralysis that may be keeping you in a situation that is not ideal for reaching your long-term goals.

But when you have finally had enough and are ready to make a move, among the first decisions you need to make is what size firm you want as your partner. Getting it right for you, your staff and your clients is critical because you don't want to have to do it all again. Large and small firms have their advantages and drawbacks, and if you are currently affiliated with one or the other, you know them well. A better choice may be to thread the needle and go with a mid-sized firm.

Kingswood CEO and Managing Director Mike Nessim recently wrote an article for AdvisorHub on why choosing to partner with a mid-size firm may be right for you. You can read the entire article [here](#).



We are exhibiting at IMPACT® 2023!
Come see us in The Exchange - Booth 1608

Portal

As part of our continuous effort to help your back office run more efficiently, we are proud to introduce the Kingswood Sales Administration Portal. The portal allows you to keep track of your requests and easily communicate with the Sales Administration Team. To learn more about the portal or to request access, please email salesadmin@kingswoodus.com.

Our Newest Office Opens in Manhattan

We are thrilled to announce the opening of our newest office in [Tower 56](#) in the heart of Midtown Manhattan! The building is currently undergoing a major renovation, but we are open for business. These new offices provide us with the best physical platform for the future as we continue to find new ways to serve advisors and their clients in New York and beyond.



Kingswood U.S.
Tower 56
126 E. 56th Street, Suite 22S
New York, NY 10022

Kingswood Partner Spotlight: AssetMark



If Clients Aren't Hearing Your Story, They Are Listening to Someone Else's.

Marketing your business is harder than ever. The environment is volatile, client expectations are rising, and the competition is loud. The key to marketing success is making sure you are delivering the right message to the right audience at the right time. You don't have to be louder. But you do have to be smarter. Download AssetMark's Marketing Matters Guide [here](#).

Kingswood Conference Series November 27-29, Scottsdale, AZ



We are very excited about the Kingswood Conference Series, Scottsdale. Our agenda is taking shape, and we are looking forward to our best event yet! Please contact Ashley Webb (awebb@kingswoodus.com) if you have any questions about.

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:

- [Goldilocks was Right: Advantages of Affiliating with a Mid-Size Firm](#) - *via AdvisorHub*
 - [Kingswood U.S. Opens New Manhattan Office](#) - *via New York Business Journal*
 - [Kingswood U.S. Launches a New York Banking Office](#) - *via Private Banker International*
 - [Kingswood Announces Closing of Syra Health Corp. Initial Public Offering](#) - *via Cision PR Newswire*
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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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