



# KINGSWOOD

PROTECT AND GROW YOUR WEALTH



## THANK YOU for a Great Year!

It has been another terrific year for Kingswood U.S. I am in awe of what this team has accomplished together. Some highlights include:



- Welcoming 16 new advisors
- Introducing Investment Banking capabilities
- Opening four new offices and establishing a presence in Boca Raton, Miami & Austin
- Hosting successful Kingswood Conferences in Puerto Rico and Scottsdale
- Being named one of the USA Today Best Financial Advisory Firms of 2023
- Being named to the IBD Elite 2023 list
- Raising funds to support the worthwhile efforts of our charitable partners - [A Friends House](#), [SkullGames](#) and [Camp Cowboy](#)

I am grateful for each and every one of you and your unwavering commitment to your clients. I hope you make time to relax and enjoy with loved ones during the holidays. We'll be here when you get back & can't wait to see what we will accomplish together in 2024!

All my best,  
Mike

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Kingswood Conference Series - Scottsdale Was a Smashing Success!



Thank you to everyone who attended the Kingswood Conference Series - Scottsdale. We enjoyed an amazing few days of learning, networking and fun, all amid the holiday lights of the Scottsdale Fairmont Princess. Thank you again to our sponsors for making it all possible.

Advisors who qualify for the Kingswood Elite Conference Series May 5-9, 2024 at the JW Marriott in Los Cabos, Mexico will be contacted by Ashley Webb in late January/early February.

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## Welcome New Advisors!

We are thrilled to extend a warm welcome to these exceptional professionals joining the Kingswood family.

- Rob Brewer
- Colin Calder
- Blake Fowler
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- Frank Hsin
- Christopher Kemper
- David Morris
- Careena Patel
- Greg Richards
- Andrea Swope
- Joseph P. Smith, Jr.
- Andrea Whitmire

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**Karen Sterling, Ph.D., CFA, joins Kingswood as**

## Senior Research Analyst



We are proud to welcome Dr. Karen Sterling to the new Kingswood Equity Research team.

"Karen's unique blend of academic and financial services experiences will place our analytical capabilities in the emergent healthcare and biotechnology sectors on par with any investment bank in the country," said Ariel Imas, President of Kingswood Investments, a division of Kingswood Capital Partners LLC. "We are thrilled she has joined our team and we look forward to leveraging her expertise to drive value across our business."

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## 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 Adds More Than \\$730 Million with Recruitment of 16 New Financial Advisors](#) - via Cison/PR Newswire
- [Kingswood U.S. Welcomes New Senior Research Analyst Karen Sterling Amid Rapid Expansion](#) - via Cison/PR Newswire
- [Advisors dig into the great crypto question](#) - via Investment News

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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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