

Is it Time to Review Your Employee Benefits?

The beginning of the year is a perfect time to review and discuss the employee benefits you provide to your employees. 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 with Maria Petroni via her Calendly link to review the PEO program for Kingswood advisors and start your company's process: <https://calendly.com/oasis-peon/kingswood>

AssetMark Introduces 2024 Business Builder Program



ASSETMARK.

Utilizing powerful analytics and time-tested expertise, AssetMark's Business Builder program can help you simplify critical business functions and plot long-term strategies for stability and growth. The ideal candidate is any advisor desiring more time to focus on client success, improve business performance, increase practice value and/or grow on a strong foundation. Click on the button below to see the schedule and register to attend this monthly series live or access past sessions on demand. Call an AssetMark Consultant to learn more at 800-664-5345.

Download File

Complete, Correct Information Leads to Smooth Paperwork Processing

Our Operations team has a few reminders to help ensure your paperwork is processed smoothly & efficiently in the new year:

Make sure information you submit on forms is correct and spelled correctly:

- Client Name (double-check that spelling!)
- Social Security Number
- Date of Birth

Ensure the client's RESIDENTIAL address is listed on the form. P.O. boxes and commercial addresses are only acceptable in the areas that ask for a "Mailing Address".

Include the FORM CRS Deliver Receipt with any account application.

Questions? You can reach out to our team at any time at operations@kingswoodus.com.

Alt Partner Spotlight: Time Equities, Inc.

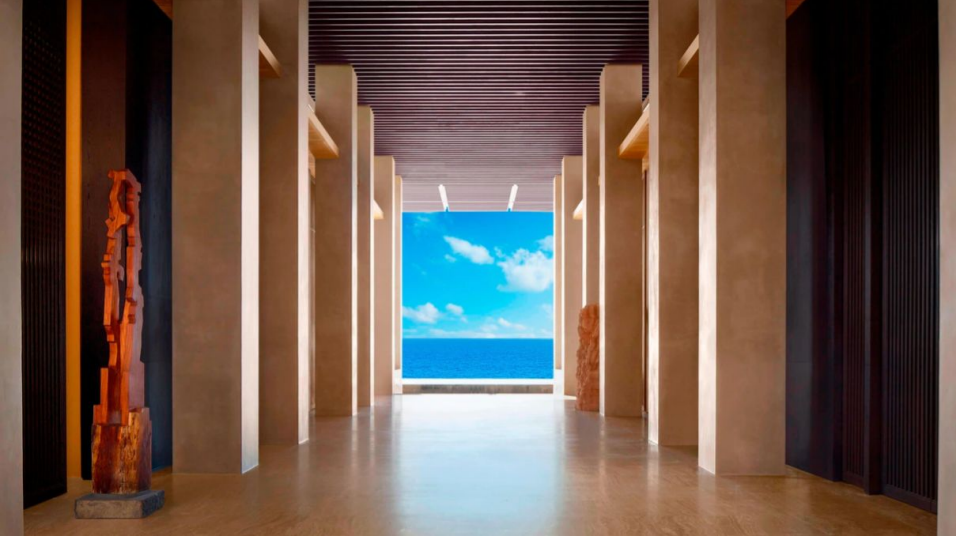


TIME EQUITIES INC.

Founded in 1966, Time Equities, Inc. ("TEI") is a diversified investment, development, asset and property management, and alternative energy company that has been in business for more than 57 years. TEI currently holds in its own portfolio approximately 42.8 million square feet of residential, industrial, office and retail property including about 5,000 multi-family apartment units, approximately 685,000 square feet in pending acquisitions, and 2.8 million square feet of various property types in stages of pre-development and development. With 339 properties across 36 states, five Canadian provinces, the United Kingdom, Germany, Italy, the Netherlands, and Portugal, the TEI portfolio benefits from a diversity of asset types including non-performing loans, B-notes, and alternative energy investments. TEI has a variety of market concentrations in the Northeast, Southeast, Midwest and West Coast of the U.S., and new markets around the world are always being evaluated.

TEI offers boutique Reg. D, private placement diversified income funds, debt and preferred equity offerings and customized 1031 exchange strategies that TEI co-invests substantial core capital alongside. Please contact Alex Anderson at 212.206.6176 or email aanderson@timeequities.com with further inquiries or visit our website at www.teiequity.com.

Kingswood Elite Conference Series - Notifications Coming Soon



The Kingswood Elite Conference Series will be held May 5-9 at the gorgeous JW Marriott Los Cabos Resort & Spa in San Jose del Cabo, Mexico. Reps who qualify for this event will be notified by Ashley Webb in the coming few weeks. Questions? Please contact Ashley (awebb@kingswoodus.com)

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:

- ['Wall Street South' beckons financial services firms](#) - 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.

Visit Our Website



Email Us

Securities Offered through Kingswood Capital Partners, LLC Member FINRA/ SIPC. Advisory Services offered through Kingswood Wealth Advisors an SEC registered investment adviser.

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