Kingswood Conference Series Rocks the Texas Hill Country

Highlights from the Kingswood Conference Series at La Cantera Resort, San Antonio.

The Kingswood Conference Series took place November 9-11 at the beautiful La Cantera Resort outside of San Antonio, Texas. More than 140 attendees, Kingswood staff and sponsors came together to enjoy three days of education, networking and fun.

We are thrilled to announce that our Opening Night Concert featuring Konstantin Alexander raised more than $17,800 to support our philanthropic partner, A Friend's House. We also raised more than $12,000 for the Love for Jamaica Foundation, a non-profit focused on recovery efforts in Jamaica after Hurricane Melissa, founded and managed by our own Nicole Bennett. It's not too late to donate - email Ashley Webb (awebb@kingswoodus.com) should you wish to participate in supporting these worthwhile causes. Additionally, you can access A Friend's House 2025 Christmas Wish List to buy gifts for A Friend's House residents & participants.

Thank you to everyone who braved flight uncertainty to attend. Thank you to our Sponsors for making the event possible. And thank you to Douglas Blake & Ashley Webb for delivering another outstanding event for our community.

Advisors: Welcome New Advisors!

Please join us in welcoming the following advisors to the Kingswood U.S. Family!

Jeffrey Falke
Kingswood U.S.

Schuyler Grey
Kingswood U.S.

Team Members: Kingswood Investment Banking Team Continues Expansion

The Kingswood investment banking team has recently added two new members to the team. Please join us in welcoming:

Max McKee
Managing Director, Secondaries
Investment Banking

George Shepherd
Analyst
Investment Banking

Investment Banking

Kingswood was proud to serve as the Sole Bookrunner for the Crown Reserve Acquisition Corp. I (Nasdaq: CRAC) IPO this month. Congratulations to all involved in this deal.

Please visit the Investment Banking Transactions page on KingswoodUS.com for a complete list of deals we've been a part of.

CIO Corner

Kingswood CIO Scott Poore, AIF®, AWMA®, APMA® writes two blogs a week - a Monday Market Recap and Friday Market Musings.

- 1/17/2025 – The Fed, AI & The Labor Market Cause Worry
- 11/14/2025 – Secrets and Clues

Equity Research

Our research team updated their coverage on the following companies:

- AEye, Inc. (Nasdaq: LIDR)
- Digi International, Inc. (Nasdaq: DGII)
- MIRA Pharmaceuticals, Inc. (Nasdaq: MIRA)

Kingswood Advisors can access these reports via the Kingswood Advisor Resource Center. If you are not a Kingswood Advisor and are interested in receiving a report, please contact Ryan Sabet (rsabet@kingswoodus.com).

If you are interested in learning about how the Kingswood Equity Research Team can cover your company, please email research@kingswoodus.com.
