Kingswood Opens New Office in Miami

Kingswood U.S. is pleased to announce the opening of its newest office in Miami, located in One Biscayne Tower at 2 S. Biscayne Blvd. The expansion reinforces the firm's continued investment in one of the nation's fastest-growing financial services markets and strengthens its ability to serve advisors and clients throughout Florida. Establishing a presence in downtown Miami reflects Kingswood U.S.'s long-term growth strategy and commitment to building a nationwide network of premier wealth management professionals in key financial hubs across the country.

Advisors

Welcome New Advisors

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

Michelle Vartanian
RMV Securities, LLC

Ralph Vartanian
RMV Securities, LLC

Investment Banking

Kingswood U.S. was honored to serve as Sole Bookrunner in the Futurewave Acquisition Corp. IPO this month. Congratulations to everyone 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.

Equity Research

Recently, we initiated coverage of NextTrip, Inc. with a Buy rating and a $5 twelve-month price target.

NextTrip, Inc. operates as a digital travel marketplace combining booking technology, advisor enablement tools, and owned travel-focused media assets. NextTrip's operating model is structured around four verticals: direct-to-consumer travel booking, B2B travel advisor platform services, luxury and experiential travel distribution, and media-driven travel discovery and content monetization.

In our view, the company is currently redefining the current demand and procurement profile of leisure travel in the United States, transitioning it from being largely transactional to being experiential in form.

Kingswood Advisors may access the full report in the Kingswood Resource Center under Equity Research (log-in required). If you need help logging in, or you are not a Kingswood Advisor and want to view the report, please email Ryan Sabet at rsabet@kingswoodus.com.

CIO Corner

Kingswood CIO Scott Poore, AIF®, AWMA®, APMA® writes two blogs a week - a Monday Market Recap and Friday Market Musings. Click on any of the links below to read his most recent analysis. Or visit his blog and subscribe to have his insights delivered directly to your inbox.

- **7/13/2026** Equities Grind Higher Despite Uncertainty
- **7/10/2026** Gifts Often Come With Warnings

In addition to writing blogs, Scott & the KEAP team provide many additional services for advisors:

- Investment Analysis – ETF, Mutual Fund, SMA
- Portfolio Analysis – Current Client / Prospective Client
- Financial Planning
- Client Ideas

To receive an investment proposal or deconstruction analysis, Kingswood advisors can find & submit a Proposal Request Form on the KEAP page in the Kingswood Resource Center (log-in required).

Kingswood In The News

Keep up with the latest from Kingswood U.S. by visiting kingswoodus.com or following us on LinkedIn.
