Kingswood Named #4 Fastest Growing RIA by Financial Advisor Magazine

We are honored to announce that Kingswood U.S. has been ranked the #4 Fastest Growing RIA firm in the nation by Financial Advisor Magazine. This achievement reflects our entire organization's relentless focus on our clients and achieving their goals. Thank you to all who have been part of our continued growth - the best is yet to come!

Kingswood advisors may use the above badge in their email signature & on marketing materials. Please visit the Award Resources page on the Kingswood Advisor Resource Center to download the image and see directions on how to add it to your email signature.

You can read the article & see the full rankings on the Financial Advisor Magazine 2025 RIA Survey & Ranking, available via the Kingswood Advisor Resource Center.

Events: Announcing the Kingswood Conference Series - San Antonio

The La Cantera Resort, San Antonio, Texas.

Mark your calendars! The Kingswood Conference Series - San Antonio will be held November 9-12, 2025 at the La Cantera Resort in San Antonio, Texas. We are hard at work crafting an agenda that delivers three days of education, networking and fun in the Texas Hill Country.

Ashley Webb and her team will be reaching out late this summer to coordinate your travel arrangements. In the meantime, please reach out to Ashley (awebb@kingswoodus.com) if you have questions.

Team Members: Welcome New Advisors!

Christopher Haddad

Adnan Hussain

Please join us in welcoming two new advisors to the Kingswood U.S. family!

- Christopher Haddad
- Adnan Hussain

If you would like to learn more about becoming a Kingswood advisor, please contact Ryan Sabet (rsabet@kingswoodus.com).

Team Members: Kingswood Welcomes Two New Team Members

Michael Bank

Linda Sofi

Kingswood continues to build out our team. Please join us in welcoming:

- Michael Bank joins as Director, Technology Investment Banking Business Development. Michael is located in our Manhattan office and can be reached at mbank@kingswoodus.com
- Linda Sofi joins as a Registration Specialist. She is located in our San Diego office and can be reached at lsofi@kingswoodus.com

CIO Corner

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

- 7/21/2025 – Tariffs Not Affecting Inflation?
- 7/18/2025 – Superstition in Markets?

Equity Research

Our research team recently initiated coverage on three companies:

- Pearl Diver Credit Company, Inc. (Nasdaq: PDCC), an externally managed closed-end investment company that invests primarily in collateralized loan obligation (CLO) tranches.
- Ribbon Communications, Inc. (Nasdaq: RBBN), a company that delivers communications software, IP and optical networking solutions to service providers, enterprises and critical infrastructure sectors globally.

- Powermers Smart Industries, Inc. (Nasdaq: PSII), a company combining innovative logistics technology solutions with a multidimensional ecosystem view of the transportation industry and its carbon credit monetization opportunities.

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