



Kingswood Named to Newsweek | Plant A Insights List of Top Financial Advisory Firms 2026



We are proud to be included in the Newsweek | Plant A Insights list of America's Top Financial Advisory Firms for the second year in a row.

This ranking was built on a shortlist of firms with more than \$20 million assets under management, at least three wealth advisers, a minimum of five individual clients and at least two years of SEC registration. These companies were then evaluated on asset performance, client performance, adviser expertise and client ratio, breadth of service offerings and conflicts of interest.

This award is a testament to the thought, care and passion Kingswood advisors put into serving their clients. Congratulations to all! You can read the full report and rankings on Newsweek.



Advisors: Welcome New Advisors!

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



Kenneth Bolton
Kingswood U.S.



Jarrett Brady
Pursue Wealth Partners



Matt Land
Stern Investments



Vincent Lucchesi
VSL Wealth Advisory



Trent Olney
Kingswood U.S.

Solutions: Solutions for Independent Dealmakers

At Kingswood, we empower independent investment bankers with the institutional infrastructure, compliance support, and distribution access of a major bank — without the bureaucracy. Built for professionals who value autonomy, efficiency, and credibility, our FINRA-registered broker-dealer platform supports full-service execution across public offerings and private capital transactions.

If you're an experienced dealmaker seeking a platform that matches your level of execution, connect with Ryan Sabet today.



KINGSWOOD

Capabilities for
Independent Dealmakers

Access institutional-grade infrastructure across public & private markets



Competitive Payout



Public Equity Capital Markets



Institutional Support



Private Capital Solutions



Compliance Support



M&A Advisory



Distribution of a Major Bank



Retail Network

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Investment Banking

Congratulations to the SOUL WORLD BANK (SWB) and Soulpower Acquisition Corp. (NYSE:SOUL) teams on announcing the signing of their definitive Business Combination Agreement.

Congratulations to Polaris Advisory Partners, a division of Kingswood Capital Partners LLC, for serving as the Financial Advisor to Soulpower Acquisition Corp. in its business combination with SWB, currently valued at approximately \$8.1 Billion.

This landmark transaction is expected to establish one of the largest digital-first financial institutions as a publicly listed company.

The graphic features a maroon header with the Kingswood logo (a stylized 'K' with a diamond) and the word 'KINGSWOOD' in white. Below this, the text 'Transaction Announcement' is displayed. A white box on the right contains the 'SOUL' logo in orange, followed by 'Merged with' and the 'Soulpower' logo in blue. Below that, it states '~\$8.1B' and 'Financial Advisor' in grey, followed by 'NOVEMBER 2025' and 'Business Combination' in bold grey. On the left, a grey box contains the text: 'Kingswood acted as the Financial Advisor to **Soulpower Acquisition Corp.** on its **Business Combination** with **SOUL WORLD BANK (NYSE:SWB)**'. At the bottom, a small disclaimer reads: 'This communication is for informational purposes only. It is not intended as an offer or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. All market prices, data, and other information are not guaranteed as to completeness or accuracy and are subject to change without notice. For more important disclosures visit Kingswoodus.com'.

KINGSWOOD

Transaction
Announcement

SOUL

Merged with

Soulpower

~\$8.1B

Financial Advisor

NOVEMBER 2025

Business Combination

Kingswood acted as
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**SOUL WORLD BANK
(NYSE:SWB)**

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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.

- 12/12/2025 – AI Spoils Fed Gift
- 12/11/2025 – There's Always Tomorrow

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