

How Time, Technology & Teamwork Can Help Advisors Avoid Common Mistakes During Transitions



A smooth transition is critical in this volatile economic environment, where clients are already concerned about their account values. In this op-ed piece, Chief Executive Officer Mike Nessim and Chief Operating Officer Val Peters share several common mistakes to avoid that can help ensure your transition is less complicated and poses minimal risk to your business. You can read the entire article on [Digital Wealth News](#). To learn how Kingswood can work with you & your team through every stage of your transition, please contact Ryan Sabet (rsabet@kingswoodus.com).

Keeping Up with Kingswood

The beginning of the year is always a flurry of activity. The easiest way to stay up-to-date on all things Kingswood is to follow us on LinkedIn. Our feed features company news, information about important partnerships, op-eds from our leadership, and articles that feature Kingswood Advisors. Visit and follow our LinkedIn page here:

<https://www.linkedin.com/company/kingswood-group-us>

New to the Kingswood Alternative Platform: Waveland Resources, LLC



Waveland Energy Partners LLC is a private equity firm focused on the upstream oil and gas industry. They invest in projects operated by some of the largest public and private exploration and production (E&P) companies in the U.S. Through their affiliate, Waveland Resources LLC, they sponsor limited partnership offerings to wealth advisors affiliated with independent broker-dealers and registered investment advisory firms. Waveland offers the financial advisor community and their accredited clients a unique “growth and income” total return strategy that focuses predominantly on pre-tax economic return to investors while providing substantial tax benefits. The objectives of this institutional private equity strategy include generating reasonable current cash distributions in parallel to building asset value through the reinvestment of a portion of project operating income, with the ultimate objective of achieving an asset sale exit transaction within three to five years.

To learn more, please visit their website: www.wavelandgroup.com. To learn more about the Kingswood Alternatives Platform, please contact Doug Blake (dblake@kingswoodus.com).

Podcast: The Seven Maxims of Business with Fran Tarkenton



If you're looking for inspiration, we can't think of a better guest than NCAA & NFL Hall of Fame Quarterback and Founder and CEO of Tarkenton Financial, Fran Tarkenton. Doug Blake & Fran talk about Fran's football career and the mindset that helped take him to the highest levels of the game. They also discuss How Fran thinks about leadership, and how his coaches and mentors helped shape his approach. You can listen to Fran - and all episodes of Wall & Main - [here on Spotify](#).

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A Friend's House Update



Thanks to your generous donations in 2022, we not only helped to renovate the girls' residence, the academic room (including a new computer suite), and purchase new washers and dryers, A Friend's House was also able to renovate the boys' residence as well.

Your 2023 donations (which Kingswood will match dollar-for-dollar) will support The Tiny Home Initiative, an effort to build residences that provide a safe space to teach young adults leaving the foster care system the life skills they need to be successful. To learn more, please visit www.afriendshouse.org. To donate, please contact Ashley Webb (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:

- [Recruitment Roundup: Kingswood US, Commonwealth, Bluespring and WEG](#) - via *Wealth Solutions Report*
 - [Financial advisors see lessons in a forgettable 2022 for investors](#) - via *InvestmentNews*
 - [Study on Social Security says it pays to wait for payouts](#)- via *Investment News*
 - [Simplification is the top reason that investors move retirement assets](#) - via *InvestmentNews*
 - [Transitions, Transactions and Promotions ...](#) - via *Wealth Solutions Report*
 - [Business owners altering retirement plans, recession fears](#) - via *InvestmentNews*
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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.

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