Overview of Kingsview Services

The dynamic of our family of companies helps to ensure investors receive a comprehensive suite of services right from the beginning. Rather than cobble together a financial plan between providers that don't communicate directly, Kingsview coordinates efforts across all our divisions to help safeguard your assets and see to it that your needs and goals don't "fall through the cracks."

KINGSVIEW WEALTH MANAGEMENT (KWM)

FINANCIAL PLANNING	PORTFOLIO MANAGEMENT	INDIV/BUIS RETIREMENT ACCOUNTS
Retirement	**Equities**	**Personal Accounts**
• Social Security Income Planning	• Common Stock	• Roth IRA/Roth IRA Conversions
• Retirement Income & Cash Flow	• Preferred Stock	• Traditional IRA
• Investment Allocations	• International Stock & ADRs	• Rollover IRA
• Legacy & Estate Planning	• ETFs & Mutual Funds	• Beneficiary/Inherited IRA
Estate	• Options Strategies	**Business Retirement Plans**
• Professional Trustee Services	**Alternatives**	• 401(k)
• Trust Adminstration	• Precious Metals ETFs	• 403(b)
• Life Insurance	• Commodities ETFs	• 457(b)
• Asset Protection	• REITs and Real Estate Funds	• Defined Benefit Plans
Education	**Fixed Income**	• Cash Balance Plans
• 529 Plans	• Bond Unit Investment Trusts	• Profit Sharing Plans
• Coverdell Education Savings	• Corporate & High Yield Bonds	• SEP IRAs
• Cash Value Life Insurance Alts	• Municipal Bonds	• Simple IRAs
	• Mortgage Backed Securities	• Solo 401(k)
	• U.S. Treasuries	
	• Certificates of Deposit	
	• ETFs & Mutual Funds	

Investment advisory services offered through Kingsview Wealth Management, LLC ("KWM"), an SEC Registered Investment Adviser. Insurance products and services are offered and sold through Kingsview Trust and Insurance Services ("KTI"), by individually licensed and appointed insurance agents. KWM and KTI are wholly owned subsidiaries of Kingsview Partners, LLC.

KINGSVIEW INVESTMENT MANAGEMENT (KIM)

Investment Strategies

- Strategic Asset Allocation
- Diversified Asset Class Selection
- Tactically Managed Strategies
- Individual Stock Strategies
- Sector Rotational Strategies

KINGSVIEW TRUST AND INSURANCE (KTI)

Life Insurance

- Term Insurance
- Whole Life Insurance
- Key Employee & BOLI
- Buy/Sell Funding

Annuities

- Fixed Annuities
- Indexed Annuities
- Immediate Annuities
- Variable Annuities

Income Protection

- Long Term Care
- Disability

KINGSVIEW STRATEGIC TAX CONSULTING (KSTC)

Tax Planning

- Tax Efficient Strategies
- Tax-Advantaged Accounts
- Investment Tax Harvesting Techniques