KINGSVIEW PARTNERS

Kingsview Partners Overview

Our Strengths

Kingsview Overview
Holding Company:
RIA, Agency, Investment Business

Mission Specific Offices
Grants Pass - HQ
Chicago - Investment Management
Fairfield - Marketing/Business Development
— 75 + advisor partners
— 42 + advisor partner offices in 19 states

What Sets Kingsview Apart

Kingsview Partners is an independent fiduciary advisory firm catering to a discerning investor who understands the value of a comprehensive financial solution. Our innovative, curated approach to investing features a team of experts working in lockstep and combining personalized attention to detail with a broad-ranging menu of services and cutting-edge technology.

It goes without saying that an investor's specific needs should always be their advisor's foremost concern. However, the problem with some Wealth Management is that registration, regulation, compensation and affiliation determine what clients are sold.

As an independent fiduciary advisor, Kingsview Wealth Managers adhere to the fiduciary oath, which places the client's interests above all else. Our transparent, no-nonsense approach ensures investors are treated like peers, not pawns.

2014

— Kingsview Partners launches independent IRA with the goal of "elevating the standard of care."

2016

— Kingsview Partners officially launches Kingsview Investment Management (KIM) to provide due diligence, practice management, consulting and high conviction model portfolio solutions.

— Scott Martin, CIMA® hired as Kingsview Investment Management CIO.

2017

— Kingsview Partners named the 7th fastest growing registered investment advisory firm in the industry by Financial Advisor Magazine.

— Kingsview Partners was named to the 'Inc 5000 Fastest Growing Companies in the United States.'

2018

— Kingsview Partners name 'Top 10 fastest growing registered investment advisory firms' by Financial Advisor Magazine.

— Kingsview Investment Management launches advisor strategy and consulting division.

2019

— Kingsview Partners named 'Top 50 fastest growing registered advisory firms' by Financial Advisor Magazine.'

— Kingsview Partners was added to the top 20% of the fastest growing companies by INC.

2020

— Kingsview Investment Management names Buff Dormeier, CMT® as Chief Market Technician.

— Kingsview Investment Management Portfolio Solutions claims compliance with the Global Investment Performance Standards (GIPS).

2021

— Kingsview Investment Management's Blue Chips Elite was nominated for SmartX's Best Large Cap Strategy and won SmartX's '2021 Best Risk-Adjusted Returns - Equities' award by achieving the highest Sharpe ratio in 2020 out of over 400 strategies in the category.

2022

— Kingsview Partners was added to '2022 Inc. 5000 list of the fastest-growing private companies in America' by Inc. 5000.

— Kingsview Partners named 'America's Top RIAs for 2022' by Financial Advisor Magazine.

2023

— Kingsview Partners named 'America's Top RIAs for 2023' by Financial Advisor Magazine.

Scott D. Martin is the Chief Investment Officer of Kingsview Wealth Management.

- *Martin serves as Contributor to the Fox News Channel and is an Index Specialist with Monarch Funds.*
- *2008, Named one of the "Best ETF Managers" by Forbes.*
- *Received the NAAIM President's Award for excellence in financial newsletter writing.*

The dynamic of our family of companies helps to ensure investors receive a comprehensive suite of services right from the beginning.

Kingsview Wealth Management (KWM)

— SEC covered RIA
— 6000 + households
— Independent custody platform
  — Raymond James
  — Charles Schwab
  — TD Ameritrade
  — Interactive Brokers

Kingsview Investment Management (KIM)

— Turnkey SMA strategies
— UMA options
— Comprehensive solutions

Kingsview Trust & Insurance Services (KTI)

— 50 State licensed independent agency
  — Life
  — Annuity
  — LTC & DI
— Industry wide carrier access
— Dedicated channel specialist

Kingsview Strategic Tax Consulting (KSTC)

— Tax planning (personal & business)
— Full service tax preparation

Monarch Funds

— Index ETFs

No Broker Dealer Registrations

Kingsview Advisors operate as true investment fiduciaries at all times. Regulated directly by the SEC and legally obligated to act in your best interest, we are compensated on the growth of your assets...not the sale of individual products. When you do well...we do well.

Outsourced Custody

Kingsview Partners is a boutique advisory firm with sizable partners, which allows us to adapt our strategies as appropriate. Our clients receive the "small firm" benefits of a custom financial plan, paired with the security provided by large custodial partners.

Transparency

Kingsview Partners offers a truly independent platform for its advisors. As fiduciaries, our Wealth Managers can effectively mitigate conflicts of interest and provide investors with a clear understanding of the motivations behind their recommendations.

Accountability

Kingsview Partners attaches great importance to the responsibility borne from our fiduciary duty. Kingsview Wealth Managers may serve up to 40% fewer clients than their peers, allowing them a greater opportunity to listen, plan and execute for the investor.

No Sales Quotas

Kingsview Advisors are truly independent... and not subject to sales quotas or bonuses for bringing on new clients. We are incentivized to spend time with the clients we have instead of focusing on the ones we don't. The only way we succeed is if our clients grow.

No Product Restrictions

Kingsview Wealth Managers are never obligated to push certain products and services. They are free to present all available options to investors and do not restrict offerings simply because they may be inconvenient, complex or difficult.