

## HOW WE ARE DIFFERENT

### FIRM STRUCTURE & HISTORY

Founded by Goldman Sachs executives with offices in New York and Tennessee, we advise and manage investment portfolios for institutional investors. We are a Registered Investment Advisor.

### FUNDAMENTAL RESEARCH

We analyze financial data, perform fundamental research, and meet with management teams of the companies we own. We combine thorough, independent research with analysis done by many of Wall Street's leading research firms when selecting investments.

## **FAMILY AND INSTITUTIONAL CLIENTS**

We manage investment portfolios and provide consolidated reporting for families with significant net worth. We also advise for endowments, foundations, and trusts.

## **INDIVIDUAL SECURITIES**

We build portfolios primarily using carefully researched individual securities rather than mutual funds.

## **FOCUSED PORTFOLIO**

We believe that a concentrated equity portfolio of 20-30 individual stocks is superior to owning hundreds or thousands of

## **CUSTOMIZED SOLUTION**

We believe every client deserves a customized solution. From portfolio construction to financial planning to interfacing with other advisors, we deliver a highly customized solution.

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## **CLIENT PROFILE**



**HIGH NET WORTH FAMILIES AND INDIVIDUALS**

ngs Point Capital Management works with families and individuals who have significant wealth. We provide custom portfolios supporting and access to alternative investments.

[CLICK TO LEARN MORE ABOUT FAMILY SERVICES](#)



## INSTITUTIONS

ngs Point Capital Management works with institutions, such as endowments, foundations, and trust companies. We provide asset management.

[CLICK TO LEARN MORE ABOUT INSTITUTIONAL SERVICES](#)

## HISTORY

Kings Point Capital Management was founded by Jack Salzman, a former Goldman Sachs Partner (Head of Equity Research Development), and Jeffrey Bates, previously a vice president in Private Wealth Management at Goldman Sachs. Jack and Jeffrey have collective experience managing investment portfolios for high net worth families, individuals, and institutions.

## RECOGNITION

Kings Point Capital has been recognized by industry leading publications

