Kingsview Partners Welcomes Wealth Manager Brian Bobby

Former Edward Jones Advisor Opens Kingsview Partners Office in Falls Church, VA

GRANTS PASS, OR, UNITED STATES, November 4, 2022 /EINPresswire.com/ -- Kingsview Partners today announced the opening of their newest office in Falls Church, Virginia. Partner and Wealth Manager Brian Bobby joins the firm with four years of industry experience.

> Kingsview Partners is pleased to welcome Brian Bobby. His commitment to understanding his client's long-term goals and creating a highly personalized strategy for them aligns with Kingsview's mission."
>
> *Sean McGillivray, Kingsview Partners CEO*

Brian works with the personal finances and investments of a select group of families and business owners, developing, implementing, monitoring and modifying their investment strategies to achieve long-term goals.

Mr. Bobby's comprehensive suite of services includes holistic financial planning, professional portfolio management, streamlined performance reporting and collaboration with tax and legal professionals. He strives to emphasize quality service and a clear process because he believes those things are essential to ensure his clients feel understood, in control, and secure with all aspects of their financial lives.

Whether the client's most important goal is to retire comfortably, have a child finish their education debt-free, or take that trip they have always dreamed of, Brian stands ready to develop a unique strategy for each client's needs.

"It's a collaborative effort," says Brian. "I work closely with the client and a team of professionals to determine the most appropriate strategies. I believe it's important to invest my time to understand what my clients are working toward before I provide investment guidance."

"We're pleased to welcome Partner and Wealth Manager Brian Bobby to the Kingsview team. His commitment to understanding his client's long-term goals and creating a highly personalized strategy for them aligns with Kingsview's mission," says Chief Executive Officer Sean McGillivray. "Our industry has done a poor job of engaging clients and delivering on their promises, but Brian's focus on service matches our desire to transform the financial space for investors."

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About Kingsview Partners

Kingsview Partners operates Kingsview Wealth Management, a fee-based Registered Investment Advisor that serves thousands of individual clients across the nation through independent advisor offices. The firm's advisory business is complemented by our full-service insurance agency, Kingsview Trust and Insurance, and our comprehensive tax preparation service, Kingsview Strategic Tax Consulting. Kingsview Investment Management, our standalone asset manager, provides investment portfolios to meet various client needs.

Kingsview Wealth Managers have a suite of options that include third-party money managers, insurance carriers, platform providers and custodians. Kingsview Partners maintains custodial relationships with Charles Schwab & Co., TD Ameritrade Institutional, Raymond James & Associates and Interactive Brokers.

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