

Kingsview Partners Welcomes Wealth Manager Mark Weatherly

*Former Edward Jones Advisor Opens
Kingsview Partners Office in Edmonds,
WA*



GRANTS PASS, OR, UNITED STATES,
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-- [Kingsview Partners](#) today announced the opening of their newest office in Edmonds, Washington. Partner | Wealth Manager [Mark Weatherly](#) is a former Edward Jones advisor and Chartered Financial Consultant™ (ChFC®) with seven years of experience.

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Mark's deep understanding of client needs and unwavering commitment to providing outstanding service is in perfect alignment with the Kingsview model.”

*Kingsview Partners CEO Sean
McGillivray*

Originally from Port Townsend, WA, Mark learned about finances at a young age and developed his "client first" ethic through early work in his family's restaurant, where revenue was heavily dependent on the tourist season and the loyalty of local customers.

"I learned back then that we had to establish a relationship where people felt comfortable coming back to us time and again, and that still holds true. Feeling confident in someone's values and ethics is paramount, especially when they're helping to guide your financial future. I'm very passionate about the full scope of financial planning,

which translates into every conversation I have with my clients."

Mr. Weatherly's comprehensive suite of services includes holistic financial planning, professional portfolio management, streamlined performance reporting and collaboration with tax and legal professionals. Every investor has unique needs, so Mark customizes his strategies to help people work toward their financial goals. Whether that means saving for education or a down payment on a new home, protecting accumulated wealth, or mapping out estate and tax efficiency considerations, he is committed to providing an outstanding client experience.

Mark's areas of focus include:

- Retirement Savings Strategies

- Business Retirement Plans
- Wealth Strategies
- Estate and Legacy Strategies
- Retirement Income Strategies
- Insurance and Annuities

"We are pleased to welcome Partner and Wealth Manager Mark Weatherly to the Kingsview team. His deep understanding of client needs and unwavering commitment to providing outstanding service aligns perfectly with the Kingsview model," says Chief Executive Officer Sean McGillivray.

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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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