

News for Immediate Release

Cambridge Names Jeff K. Van Wart to 2024 Circle of Excellence

Achievement to be recognized at annual conference in June

Houston, Texas December 20, 2023 – Jeff K Van Wart of King Capital Advisors, Inc. has been named to the 2024 Circle of Excellence, the highest level of achievement recognized by their financial solutions firm, Cambridge Investment Research, Inc. This recognition is granted to financial professionals who have displayed strong leadership in their field as well as a commitment to upholding Cambridge’s core values of integrity, commitment, flexibility, and kindness while providing exemplary service to their clients.

Cambridge’s Circle of Excellence qualification is earned by financial professionals who demonstrate their commitment to serving the needs of their clients, while maintaining an independent, service-driven mindset. Introduced in 2023, the Circle of Excellence distinction provides opportunities for financial professionals to meet other leaders in their field, gain exposure to new perspectives, and continue to hone their skills and talents. Qualifiers will gather in Vancouver, BC in June 2024. They will be joined by members of Cambridge’s senior leadership team, and the multi-day event will include networking sessions, industry speakers, and exclusive educational opportunities. The event provides an opportunity for members to meet other independent financial professionals that have demonstrated an exemplary commitment to service, learn from industry leaders, discuss developments in financial services, and hone their skills through sharing knowledge and ideas. Honorees will be able to engage in community-building activities, share experiences and gain valuable feedback, make connections, gain in-depth insight to the latest developments and trends, and return to their practices with an ignited passion for serving their clients at the highest level.

“We are honored to have Jeff K. Van Wart as a Circle of Excellence qualifier,” said Cambridge President of Growth and Development Jeff Vivacqua. “Culture and success go hand in hand, and at Cambridge, we strive to provide a culture dedicated to service. Jeff K. Van Wart has demonstrated his commitment to our core values and a true passion for serving his clients. We strive to provide opportunities for our independent financial professionals to share different perspectives and collaborate with colleagues and peers to grow their leadership in the industry.”

About King Capital Advisors, Inc.

Established in 2006 by President and CEO, Jeff Van Wart, King Capital Advisors emerged from Jeff’s decades of experience managing corporate, family and individual portfolios. Fueled by an entrepreneurial drive and an unwavering commitment to excellence, Jeff transformed his vision into reality. Today, the team of financial navigators thrives in the dynamic currents of the modern economy. Their expertise lies in helping to curate wealth and fixed-income solutions, spanning from individuals and families to major institutions and enterprises.

About Cambridge

Cambridge is a financial solutions firm focused on serving independent financial professionals and their clients while preserving its internal control. Cambridge offers a broad range of choices for independent financial professionals regarding solutions for advice, growth, technology, and independence.

Cambridge’s national reach includes: Cambridge Investment Research Advisors, Inc. – a large corporate RIA; and Cambridge Investment Research, Inc. – an independent broker-dealer, member FINRA/SIPC, that is among the largest internally controlled independent broker-dealers in the country.

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The Cambridge Circle of Excellence award is 2024 is based on personal and/or office production benchmarks established by Cambridge. This award is not based on investment performance or indicative of client experience.

This is intended for informational purposes only and should not be used as the primary basis for an investment decision. Consult a financial professional for your personal situation.