

For Entrepreneurs, By Entrepreneurs

An Interview Kyle Wool, President, Revere Securities LLC

EDITORS' NOTE Kyle Wool serves as President of Revere Securities, where he oversees Securities and Private Wealth Management which provides integrated strategies designed to help build, manage, and preserve wealth for wealthy families, endowments and foundations. Previously, he was an Executive Director at Morgan Stanley and the head of The Wool Group. Prior to Morgan Stanley, Wool was a Managing Director at Oppenheimer and Co. Inc., and from 2010 to 2013 was based in Hong Kong where he served as a Managing Director of the Professional Investors Group for Oppenheimer Asia Ltd. Wool has been a featured speaker on Executive Services and Wealth Management at the China Entrepreneurs CEO & CFO Forum. He has also been a featured speaker on U.S. Markets and Foreign Direct Investments at the Fujairah U.A.E. International Business Forum. He is active in various philanthropic endeavors both domestically and abroad. He currently serves as a board member of LifeLine NY and the CIRSD (Center for International Relations and Sustainable Development) as well as the Lang Lang International Music Foundation. In 2019, Wool was honored by Crown Princess Katherine with the LifeLine Humanitarian Award.



Kyle Wool

(AUM) across an extensive liquid portfolio, alternative assets, private equity, 15 proprietary SPVs and our own ETF. At the forefront of financial technology, Revere provides the most up-to-date information to our clients as they look to stay current and drive toward their goals.

Headquartered in New York City, Revere has more than 75 professionals in five offices located in New York City; Boca Raton, Florida; West Palm Beach, Florida; Boston, Massachusetts; and Middletown, Ohio. Revere's domestic

and global clients include high-net-worth individuals, family offices and fund managers.

Our firm is a modern-day broker-dealer with a niche in the U.S. emerging growth sector and is, as we often like to say, "FEBE," For Entrepreneurs, By Entrepreneurs. Many of our clients acquired wealth through entrepreneurial endeavors, and we advise them through the entirety of their personal and companies' full life cycle, from start-up phase to IPO to post-IPO.

It is with this same entrepreneurial spirit that we create solutions that today's entrepreneurs and business owners seek to help achieve their lifetime goals. Our approach to wealth management extends far beyond managing an investment portfolio. We are about wealth management as well as wealth creation and, in this, we seek to

provide our clients with opportunities in both the public and private marketplaces that they might not receive anywhere else.

We develop a holistic, comprehensive understanding of who our clients are so we can work with them to determine the optimal investment strategies to help them reach their long-term goals. Revere is committed to building a relationship of trust in which we can work closely with clients to help them define their objectives, explore alternatives, and choose the financial and investment strategies that are most appropriate for them.

Will you highlight Revere Securities' service offerings and where you see the greatest opportunities for growth for the business?

As a full-service global broker-dealer, Revere provides our clients with strategically balanced portfolios of traditional stocks and bonds and tactically positioned portfolios incorporating Private Equity (PE), 15 Proprietary Special Purpose Vehicles (SPV's) and the Revere managed and operated Exchange Traded Fund (ETF). Launched last year, our ETF is 11-sector weighted and exemplifies our forward-thinking and creative ideology. It captures the sectors we believe will be the outperformers over the next 6 to 12 months and is adjusted in response to market forces. Ringing the bell at the NYSE last August to celebrate our active ETF was a highlight for all of us at Revere.

FIRM BRIEF Revere Securities LLC (reveresecurities.com) is a global broker-dealer firm providing strategic and financial support to institutional investors, hedge funds and individual investors. The firm's professionals are involved in all components of the sales and trading process and include extensive compliance and operational personnel. In addition, Revere Securities provides differentiated corporate access, helping institutional clients gain access to management as a component of their investment process. The firm has industry focused sales specialists who possess "buy-side" experience and provide a sound, alternate perspective to the investment process.

Will you provide an overview of Revere Securities' business and how you define the Revere Securities difference?

Revere Securities is a full-service FINRA and SEC licensed global broker-dealer with more than \$1B in assets under management

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As we look at our opportunities for growth, we prioritize the client experience and utilize the most elite fintech providers. Our industry-leading data aggregation and reporting capabilities enable us to work with our clients to manage wealth holistically to build long-lasting, trusted relationships. Through the use of technology, we are positioned to best take advantage of market conditions and provide our clients with the most up-to-the-minute information they need to mitigate risk and ultimately pursue their goals.

With these capabilities, we aggregate all financial accounts to provide a consolidated view of portfolios, no matter the type of asset class, currency, or entity. Our technology means we can instantly analyze and visualize portfolio data, including liquid and illiquid client portfolios, to quickly create fully customized reports tailored to each of our client's needs.

You assumed the role of president of Revere Securities in April 2022. What are your priorities in the role and how are you focusing your efforts?

A major priority for me is elevating our position as a firm of entrepreneurs for entrepreneurs while promoting our culture of partnership. By employing innovative, concierge solutions and strategies, I believe we are at the forefront of financial services because we are putting our clients and their interests first. At Revere, I also work to instill a value of partnership into all that we do. I want everyone to feel like they are an integral part of what sets us apart: providing distinguished, innovative services for our clients.

In my role as President, I also consider myself Chief Culture Ambassador. By bringing like-minded industry talent and experts together at Revere, my vision is to reinvent the best of Wall Street from the late '70s and '80s when firms were LLPs, comradery was paramount, and client experience was the focus and goal. In doing this, I work every day to lead by example,

never asking of others something that I would not do myself. I seek to serve as a friend and mentor as well as a partner and aspire to foster our firm's sense of entrepreneurship and partnership that I envision is at the core of what we do.

You also lead Revere's Private Wealth Management initiatives. Will you discuss this offering and your outlook for Revere's Private Wealth Management business?

Private Wealth is changing so rapidly, and the cookie-cutter approach of the big banks predicates a certain risk allocation and diversification. But does this fit the next generation investor? The next generation, for example, is buying cryptocurrency and investing in pre-IPOs. I do think everyone has their own individual circumstances and risk tolerance and there is always an important place for traditional wealth management, but I also feel there is a place for certain individuals to take a portion of their investments, on a risk adjusted basis, and give them the same access to say, a SpaceX or Instacart, which is currently in the pre-IPO stage. At a major bank, this may only be accessible for the ultra-high-net-worth investor, but we see a different future.

Forefront at our client relationships is the ability to customize solutions that are right for our clients, their families, and their businesses. In doing so, we pride ourselves in providing offerings that are most likely not accessible at the large financial institutions. We work with premier partners to deliver an optimized experience while focusing on flexibility and our ability to deliver the best experience to our clients.

How important is it to continue to build the Revere Securities team and will you highlight the talent and expertise at the firm?

For us, talent is key and a major priority of Revere. By next year, estimates suggest there will be more assets under management at RIAs

than the traditional wirehouses. This means that we focus on attracting the kind of talent that wants to be a part of the culture of entrepreneurship and partnership that I so strongly believe in and promote. With multi-generational and multi-national talent, many of us at Revere bring hundreds of decades of experience from the wirehouses and diverse specialties and areas of expertise. In bringing together our unique brand of top talent, we benefit our clients and promote our culture of partnership.

We are especially proud at Revere that many of our top talent are veterans who served our country in the branches of the U.S. military. Supporting veterans' causes also is a philanthropic priority. For me, I have been a long-standing supporter of nonprofit organizations, especially those focused on children and veterans. At Revere, we infuse this strong commitment to philanthropy in our approach to doing business. Giving back is a core value for us, whether it be through supporting causes or helping our clients realize their personal philanthropic goals and aspirations.

Do you feel that there is effective brand awareness for Revere Securities and is it a focus to build greater brand recognition for Revere?

Relationships are at the center of what we do, and our brand's foundation is steeped in a commitment to deliver the best offerings for our clients. In nurturing and growing these relationships, I believe our most important asset is our talent. Every day, we as a firm come together, prioritizing talent and development to endeavor to continue to deliver the most optimal solutions for our clients.

Since the 1980s, Revere has been well known on Wall Street. What is especially exciting right now for us is that, in the last 18 months, we have grown leaps and bounds. We have brought in top talent partners, we have embarked on initiatives such as bringing together Capital Markets and IPOs, we have had more than 50 tombstone transactions, and we launched our own ETF. In this effort, we have remained ahead on the digital front, making sure we access data and reporting while promoting our brand through marketing. These efforts elevate the Revere brand of entrepreneurship, partnership, and client-focus.

Did you always know that you were interested in a career in finance and what has made the industry so special for you?

Growing up in Upstate New York by the Finger Lakes, and in college in the late '90s, I just caught the bug. I started in the industry at the peak of the Nasdaq and have seen the waves of the financial services industry since then. I have always stuck with it, and I like the opportunities and the challenges. But, most of all, especially in my role today, I like the chance to work with clients and our talent at Revere, strategizing and finding today's optimal solutions. What is most special? I have always wanted to do what I have the opportunity to do today: manage wealth and find unique ways to create it alongside the top talent in the business for valued clients that deserve only the best. ●