

Title: Unaffiliated my ass...

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Permalink: /r/TheGloryHodl/comments/oty71w/unaffiliated_my_ass/

Url: /r/GMEJungle/comments/otvabt/kestra_advisory_services_llc/

Linked Post Content:

Hey guys,

So Charlie recently posted [this video](https://www.youtube.com/watch?v=yFi-gWysLlg)

The whole thing seems weird so I dug into Kestra Advisory services a bit more and found [this](https://www.sec.gov/litigation/admin/2021/ia-5770.pdf)

<https://preview.redd.it/9y72y6y6v4e71.png?width=2650&format;=png&auto;=webp&s;=c438733f1ff116de53a60e1bb0398adb7a52229>

<https://preview.redd.it/gv2baa78v4e71.png?width=2378&format;=png&auto;=webp&s;=1474880f5b13c0b06c7c6ce0eb9d10c6c5f8b838>

Also, their portfolio value on Fintel is insane:

<https://preview.redd.it/nduyegz9v4e71.png?width=984&format;=png&auto;=webp&s;=6201cb0d0edd8c49245b40f39cb53e0f2b480c23>

[Fintel Link](https://fintel.io/i/kestra-advisory-services-llc)

I don't know much about SEC filings, but this seems like a red flag when you combine it with the info from Charlie's video.

IDK, could be nothing, could be something, just thought I would share.

****EDIT:****

Okay so digging into their portfolio value a bit more I found this:

<https://preview.redd.it/vp6oeiima5e71.png?width=3484&format;=png&auto;=webp&s;=7321edec45dd831b8fd25ab9e12d9f127a5dacc2>

a 3 TRILLION \$ gain in the last 12 months? huh?

[LINK](https://fintel.io/i13fs/kestra-advisory-services-llc)

Further, if you do a general google search for these guys they are reported to have a holding of only \$34 Billion. What is going on?

Their Fintel portfolio value seems legit, they have a lot of big holdings: [look here](https://fintel.io/i/kestra-advisory-services-llc)

Who the fuck are these guys??

Also thanks u/_writ for finding [this](<https://wallmine.com/fund/4tt/kestra-advisory-services-llc>)

More evidence that they have a portfolio of 8 trilli

<https://preview.redd.it/q0xuq236m5e71.png?width=1424&format;=png&auto;=webp&s;=acd031b711dcac52fbaed01f8a032d3492523f55>

****ANOTHER EDIT:****

Okay so the CEO of Kestra Advisory Services, LLC is ****JAMES LYNN POER****
[LINK](<https://brokercheck.finra.org/individual/summary/1983357>)

If we follow his records we see that he used to work for something called KESTRA ****INVESTMENT**** SERVICES, LLC - Nice

<https://preview.redd.it/8vxtc1wsj5e71.png?width=2012&format;=png&auto;=webp&s;=63b3a622eeb0d9cec55540ed25873967bef24c68>

A quick search for 'Kestra Investment Services LLC' and I find
[this](<https://www.investorlawyers.com/kestra-investment-services.html>)

<https://preview.redd.it/m7bj9djej5e71.png?width=1874&format;=png&auto;=webp&s;=cd6d9e63a937b4fd525108f1eff321d8cbb89dcf>

These guys are shady as fuck.

<https://preview.redd.it/fbquy7cpi5e71.png?width=1598&format;=png&auto;=webp&s;=2d9d1bf3b0056c30fdc45ee3ac9b1890074333cb>

lol

Remember, this was all under the name Kestra ****Investment**** Services, not Kestra ****Advisory**** Services.

So they did a whole bunch of illegal shit and then just changed their name a lil.

[Here is even more shady shit done under the KIS name.](<https://www.sonnlaw.com/investigations/kestra-investment-history-regulatory-sanctions/>)

<https://preview.redd.it/vfuoya5np5e71.png?width=3122&format=png&auto=webp&s=60f916e1ea664d0a845e97ba5e4807fd79bcb348>

****ANOTHER EDIT:****

****Kestra Advisory Services**** have only filed 4 13F forms since 2013

<https://preview.redd.it/g50qaa5eu5e71.png?width=3748&format=png&auto=webp&s=30a256daf3d05320faf4cbbbe75f7a1bcbe5faa1d>

There are several mutations of the Kestra name on the SEC site

<https://preview.redd.it/d9ndh5lfv5e71.png?width=3730&format=png&auto=webp&s=dc18d5d6f067cf4a4b36356a3deb5bec009cb967>

After looking through them all ****Kestra Private Wealth Services**** is the only other one with 13F filings.

<https://preview.redd.it/0tj849ewv5e71.png?width=3530&format=png&auto=webp&s=b688a6690414a8ff15f040d8625abffc57076811>

Again we are looking at some pretty big numbers for these 13F files

<https://preview.redd.it/4k07yxa0w5e71.png?width=2226&format=png&auto=webp&s=dc6387b2842708b644925825b402eae4bb177ec1>

All the Kestra mutations have only filed 7 13F forms in the last 20 years. All of them in 2020 and 2021. All of them in the trillions of \$.

****ANOTHER UPDATE:****

Okay, so I smoked another joint and decided to dig into ****Kestra Private Wealth Services.**** Turns out that these guys have some pretty big dicks too.

[lol @ 420](<https://preview.redd.it/hx4kucbod6e71.png?width=1272&format=png&auto=webp&s=dee0a11ac0c1b9078a7f96b530be7848e675dd80>)

Looking through their holdings I saw some familiar faces:

(I believe \$ on this chart is (\$1000) - someone correct me if I'm wrong on this please.)

[Citigroup: 33,519 shares @ \$2,439,000,000](https://preview.redd.it/nugql5rde6e71.png?width=2370&format=png&auto=webp&s=b66170db5dae0775ae2559a1c0c5bfcd49f22451)

[Vanguard Index Fund 52,228 shares at \$10,795,000,000](https://preview.redd.it/9qnp4551f6e71.png?width=2366&format=png&auto=webp&s=522327b2f74f1b5cace23686fb15f55ea0efe034)

You can see the full list [here](https://fintel.io/i/kestra-private-wealth-services-llc) but let's just focus on these for now.

If you dive into VTI you find this:

https://preview.redd.it/smstjzouh6e71.png?width=1784&format=png&auto=webp&s=b53a1e79ae38f70f8c4ce8604dec2ae80144363c

[BTW, a trillion in numbers looks like this: 1,000,000,000,000](https://preview.redd.it/c61t62ewh6e71.png?width=882&format=png&auto=webp&s=6fb37c07bbf146012aaf76000f7cc5fea7488a43)

[LINK](https://investor.vanguard.com/etf/profile/VTI)

Okay, now, jump back into Fintel, search for VTI and I find [this](https://fintel.io/so/us/vti)

Scroll down to Institutional Ownership, search by highest value and look at what comes out on top:

https://preview.redd.it/o0niucslsj6e71.png?width=2730&format=png&auto=webp&s=ff4ad7e4a96d443e32af3d7dce1c4bd7fce91232

Kestra, Kestra.

So now we have Kestra Advisory Services and Kestra Private Wealth Services. They have a combined total of about 10.5 trillion \$ and strong links to a Vanguard ETF.

Now, run the same process for Citigroup and we find this:

https://preview.redd.it/gle2p2sgl6e71.png?width=2752&format=png&auto=webp&s=0836baabd49c005bfc917115143f83e368fbbdd2d

IDK man, looks like a big circle jerk to me...

****ANOTHER UPDATE:****

Okay I look into Kestra Private Wealth Services a bit more and well...

[lol](<https://www.sec.gov/litigation/admin/2021/ia-5771.pdf>)

That file is probably worth digging into for people who can understand what the fuck they are saying.

I've reached the 20 picture limit for Reddit posts so no more screenshots. I will leave this here for now.

I have a feeling that this is just the tip of the iceberg though so look out for another DD post tomorrow. Im going in.