



[\\_ \(https://castlekeepadvisors.com/index.php\)](https://castlekeepadvisors.com/index.php)

MENU

[\(https://twitt](https://twitter.com)  


[\(https://www  
Investment-  
Advisors-  
LLC/125794](https://www.investment-advisors-llc/125794)

## Why do people who can go anywhere come to CastleKeep?

CastleKeep Investment Advisors LLC (CastleKeep) is a family-owned, independent Registered Investment Advisor (RIA) located in Westport, Connecticut. CastleKeep is headquartered in Fairfield County, Connecticut but serves clients all over the United States and the rest of the world.

Charles Haberstroh established CastleKeep in 2000 with the founding principle that very wealthy client families deserve a more independent, flexible and personal level of service than that typically provided by large financial institutions. We don't sell product. We provide our clients with the powerful combination of unbiased financial advice and the global breadth of an "Old World" private bank.

### Independent Wealth Management

Whether our clients prefer [Discretionary Investment Management](https://castlekeepadvisors.com/index.php/services/category/management) (<https://castlekeepadvisors.com/index.php/services/category/management>) or [Advisory Services](https://castlekeepadvisors.com/index.php/services/category/advisory) (<https://castlekeepadvisors.com/index.php/services/category/advisory>), we offer unbiased wealth management solutions that are unique and personal. We do not sell product. We do not use model portfolios. Every portfolio is individually tailored to each client's financial objective, using best-of-breed investment managers and solutions from all over the world.

For clients who wish to have an independent quarterly review of their current Investment Advisor, CastleKeep offers its [Money Manager Monitoring](https://castlekeepadvisors.com/index.php/services/category/monitoring) (<https://castlekeepadvisors.com/index.php/services/category/monitoring>) solution.

### The Roundtable Approach

Our clients are among the world's most successful in their respective businesses. And none of them got there alone. That is why CastleKeep uses the concept of the Roundtable to ensure that all of our clients' most trusted advisors have a place to confer and collaborate as equals.

## From the CKBlog

[Berkshire Meeting Notes](https://castlekeepadvisors.com/index.php/blog/view/berkshire-meeting-notes) (<https://castlekeepadvisors.com/index.php/blog/view/berkshire-meeting-notes>)

Markets change. Politics change. But each year, Warren Buffett and Vice Chairman Charlie Munger stay on message and remind us to tune out the considerable static, do our homework, and act with conviction when the odds are in our favor.

## Family Office Solutions

Our clients require a special level of attention. Whether they need help managing a real estate purchase, lending solutions, making travel arrangements, bill paying services or help with an asset sale, they turn to us. We act as a family's personal CFO for their financial affairs. We believe being flexible, independent and creative gives us an edge with our clients.

© 2019 CKA Holdings LLC, Westport, CT. All rights reserved. CastleKeep Investment Advisors. An SEC Registered Investment Advisor.

For privacy information please read our [Privacy Policy](https://castlekeepadvisors.com/index.php/resources/category/privacy) (<https://castlekeepadvisors.com/index.php/resources/category/privacy>).

Website by [InfoPulse LLC](http://infopulsellc.com) (<http://infopulsellc.com>).