WEALTH MANAGEMENT FOR INDIVIDUALS, FAMILIES & COMPANIES

Fee-Only Fiduciary Financial Planners

MEET YOUR FINANCIAL TEAM (/team)

WHAT WE OFFER

WE HELP YOU TO MAKE SOLID FINANCIAL DECISIONS

We are your on-call resource for your financial questions.

WE WORK IN YOUR BEST INTEREST

We help you put together a individualized financial plan and then we monitor and review it to assist you in reaching your goals.

WE ARE EXPERIENCED INVESTMENT MANAGERS

Our staff has credentials and experience (CPA/PFS, CFP & CFA). We put our experience to work for you, as fiduciaries, getting paid only by our clients, receiving no commissions.

Learn More (http://castlewm.com/services/)

BUSINESS STRUCTURE

DEDICATED CLIENT CARE, BUILT IN

CFA Institute

CASTLE WEALTH MANAGEMENT IS ONE OF 1,000 ASSET MANAGEMENT FIRMS WORLDWIDE THAT ADHERE TO THE CFA INSTITUTE'S ASSET MANAGER CODE OF PROFESSIONAL CONDUCT

What is CFA? (https://www.cfainstitute.org)

Look Us Up (https://www.cfainstitute.org/ethics/codes/assetmanager/Pages/firms_claiming_compliance.aspx#C)

1

In contrast to traditional broker/dealer relationships, as a Registered Investment Advisor firm, we are required to always act as your fiduciary, strictly serving your best interests.

2

We are compensated strictly through your fully disclosed fees, refusing commissions or any other misaligned third-party incentives.

3

We seek the lowest-cost investment solutions among those that best meet your goals (others offering non-fiduciary advice are not similarly obligated).

4

Our Account Review Committee meets on a weekly basis to review individual portfolios' performance.

Learn More (http://castlewm.com/investment-committee/)

Why Choose Castle (https://castlewm.com/why-choose-us/)

HOW WE WORK

Experience

Our management team has extensive experience serving as investment advisers to wealthy families and individuals.

Relationships

Our continued success is a direct result of the relationships we build with our clients. We are devoted to helping our clients achieve financial success.

Understanding

We reinforce our commitment by really listening and gaining an in-depth understanding of specific circumstances before making recommendations.

Communication

It is our policy to respond to all client correspondence in a prompt manner. Our team places a premium on client interaction.

Focus

We are able to focus our attention on the client because we have made a conscious decision to have fewer families per adviser.

Reliability

Our clients know they can rely on us for all of their investment needs, large or small, business or personal.

Meet The Team (https://castlewm.com/team/)

JOIN OUR NEWSLETTER

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FORTIFY YOUR FAMILY'S FUTURE

Connect with Us (/contact)

Wellington Chamber of Commerce (https://www.wellingtonchamber.com/business-directory/?as=Castle+Wealth+management&submit=Search)

(http://www.twitter.com/CastleWM)

(http://www.linkedin.com/company/castle-wealth-management)

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