



Most investors are reasonably comfortable investing in stocks, but less confident with bonds.

Castleton offers a fee-only consulting service that provides an objective and unfiltered second opinion of clients' bond investments—analyzing and evaluating a fixed income portfolio's structure, risk and strategy.

Access a second opinion from accomplished bond specialists.



Portfolio Review

Beginning with a review of a portfolio's credit quality, coupons and maturities, we offer an assessment of strategy, allocation, and security selection.

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Hourly fee



Review of Services

We can accompany clients to meetings with existing or prospective investment advisers and help address issues including management process, risk exposure and fees.

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Hourly fee



Today, the financial marketplace is saturated with products and services designed to achieve an endless variety of objectives.

For investors of all levels of sophistication, it can be challenging to determine which options are best. Individual bonds, mutual funds, closed end funds and ETFs each offer a solution that could be beneficial to you. But which is the most appropriate, cost efficient and safe?

As an asset class, fixed income is an effective vehicle for wealth preservation, because it delivers a predictable stream of income while offering protection of principal. Yet it can often be misunderstood—by investors and advisers alike.

Often, investors assume their fixed income portfolios are liquid, safe, and require little attention. However, as we have seen since the events of the financial crisis of 2008, there are many market dynamics—both global and domestic—that can have significant impact on bond investments. We formed our consultancy to provide investors with a qualified second opinion of their portfolios—analyzing risk, liquidity, strategy and structure.

Many investors entrust their bond allocations to generalist or equity-oriented advisers. Castleton seeks to identify some of the most common errors associated with fixed income investing and to assist investors in implementing appropriate strategies to achieve their objectives.

Areas of Expertise

- **Closed End Fund**
- **Investment Grade**
- **Tax Exempt**
- **High Yield**
- **Mutual Fund**
- **Taxable**

Offices

New York, NY
Vero Beach, FL

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