Welcome to Castle Wealth Planning

Castle Wealth Planning provides asset management and
financial planning services to individuals, families and small businesses.

Sign up to receive the
Castle Wealth Planning Newsletter.

JOIN NOW

The Founder

Nate Cultice CFP, FSA, is founder and President of Castle Wealth Planning.

With 25 years of financial industry experience including the past 17 years as a financial planner here in Santa Barbara, I'm proud to have founded Castle Wealth Planning, a fee-only financial planning and asset management firm.

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About

As an independent, fee-only financial planning firm, Castle Wealth's primary obligation is its fiduciary duty to the client.

We do not sell commission-based products and we are bound to act in the best interest of the client and provide unbiased advice.

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Our Expertise

Investment Management

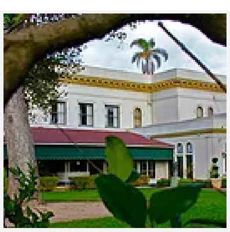
Individual Stock Selection

Retirement Planning

Financial Planning

Team Approach

News & Publications



Stock Declines May Be Almost Over, But Fed Communication is Not Helping!!

It's been a difficult summer for stocks - falling 8% from their May highs and supporting the old market adage, "Sell in May and Go Away!"

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Castle Wealth Planning is working on new blog posts!

Here are some of our past entries.

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Recent Purchases

Here are some recent purchases made for clients by Castle Wealth Planning. Check back to see what's new.

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Connect With Us

Castle Wealth Planning is here to

Castle Wealth Planning is here to help you plan your future, together.

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