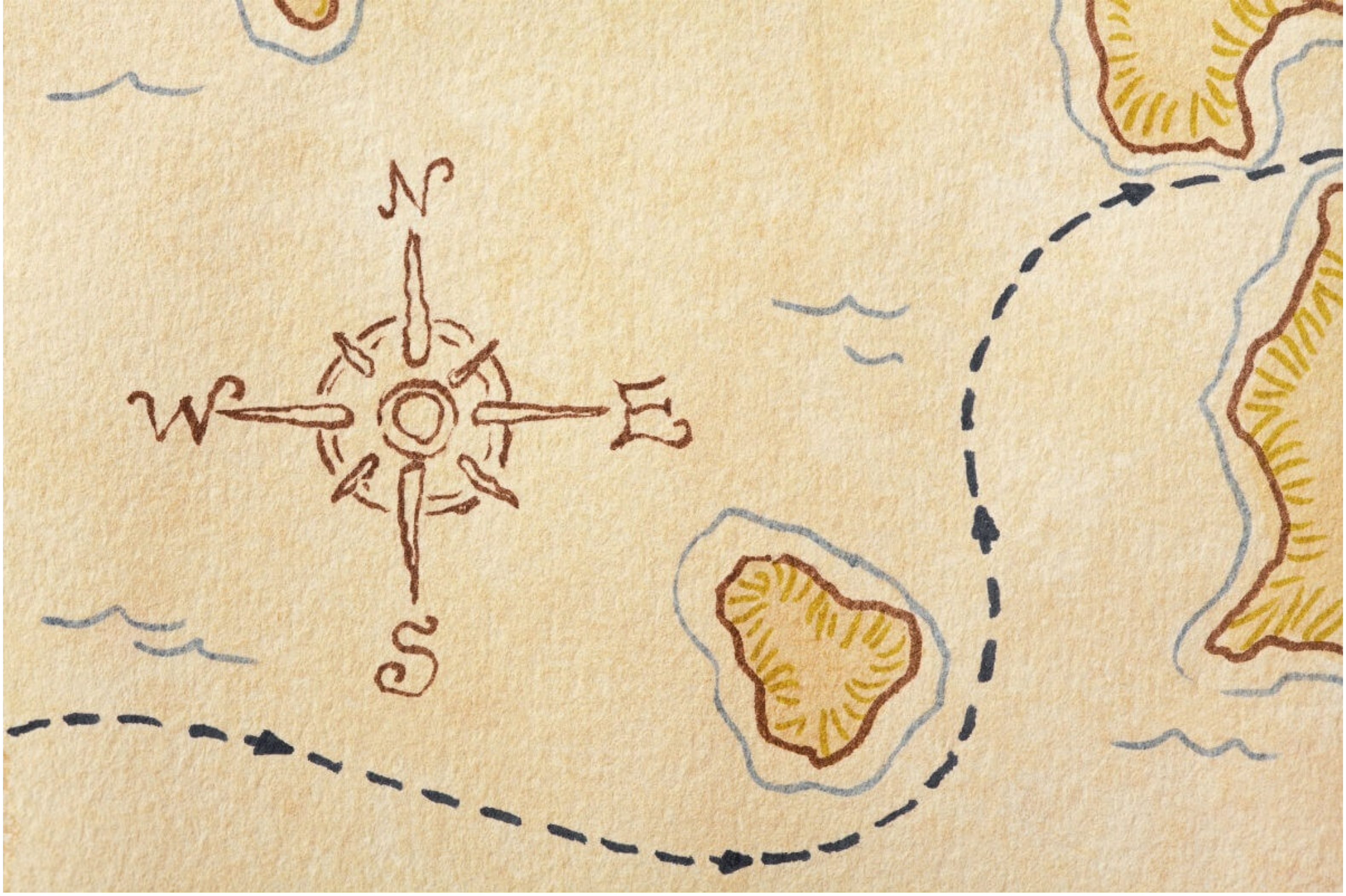
CASTLEVIEW
PARTNERS

"Investment and Planning Advice…
powered by Service, Independence and Technology."

WELCOME TO CASTLEVIEW PARTNERS

Experience and Knowledge to Serve You



We are an independent financial advisory firm with one passionate focus -- providing objective guidance and advice to our clients that helps them to achieve their lifetime financial goals.

Our aim is to be our clients' most trusted financial advisor. Toward that end, we are organized as a fee-based, SEC-regulated Registered Investment Adviser (RIA). This helps to ensure that our advice is always objective and our recommendations are solely in our clients' best interests. Maintaining objectivity requires that we be free of the conflicts (frequently commission-related) that have often been intrinsic to the banks, insurance companies and old Wall Street brokerage houses that historically have dominated the financial advisory business. Most financial advisors are still affiliated with these traditional industry players, even today. We have chosen to be independent of them.

Being licensed as an RIA firm legally requires us to act as a fiduciary for our clients, as distinct from adhering to the looser guidelines which non-fiduciary advisors must follow -- guidelines that leave these advisors susceptible to being tempted into making commission-driven recommendations that may or may not be in their clients' best interests. Since we have always believed that the fiduciary standard is the only appropriate standard for us as advisors -- it has always seemed obvious to us that our clients' interests must come first in the formulation of our recommendations -- this RIA requirement suits us just fine.

Castleview has a team of independent advisors and senior staff whose experience aggregates to more than 100 years. Headquartered in Dallas, we have offices in Chicago and Miami and serve clients around the country. We are also increasingly attracting the interest of many independent advisors who are seeking ways to improve their service to their clients (or who wish to free up time they now must devote to the nuts-and-bolts of investment management) -- and who are drawn to the powerful, best-of-breed investment and technology platforms that we have built to better serve our clients.

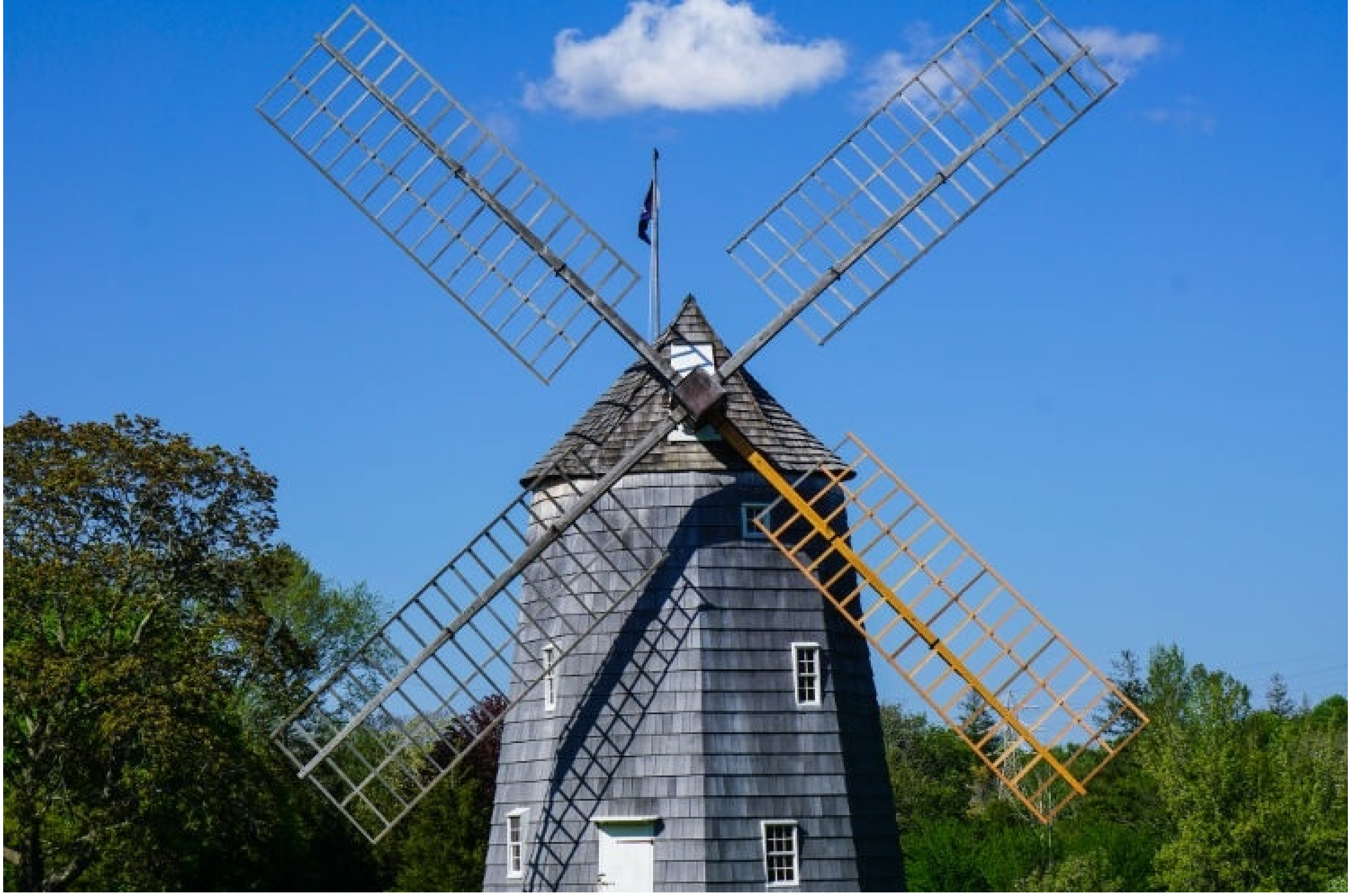
We invite you to explore our website further to learn more about what our firm does, how we do it and how we make a difference in the futures of our clients and their families. And we hope that you'll reach out to any of us at Castleview if you have questions or if there's some way in which we can be helpful to you.

WHO WE ARE

WHAT WE DO

HOW WE DO IT

WHY CASTLEVIEW



Check the background of your financial professional on FINRA's BrokerCheck.