CASTLE ISLAND
FAMILY OFFICE

REDEFINING TRUE PARTNERSHIP

Throughout your life, you worked to build financial security, and your accumulation of wealth expanded ever greater.

Having arrived at true prosperity, the possibilities, and the responsibilities, seem countless. At this point in your journey, you are searching for a way to refocus your most valuable assets – your time and energy - to tend to what matters most to you. Whether that be growing your wealth, finding exciting new opportunities, ensuring your family's generational security, or maximizing your private enjoyment, a trusted partner experienced in navigating substantial family capital can lift the encumbrances that come with it.

Your Steward. Your Compass. Your Beacon.

With a collective 50 years serving some of the wealthiest families in America, Castle Island has honed a unique skill set designed to expertly manage the complexities which lead to sustained financial success. For the families we serve, we play a central role in each and every financial decision, strategically facilitating the continued safe and efficient accumulation of wealth. Our holistic mandate is to support all aspects of the process with the dependability of a trusted advisor, and the vigor of a Fortune 500 company.

Every financial decision has deep legal, tax, risk, and strategic ramifications contained within. We seek to centralize and formalize underwriting of these decisions, yielding results which are compliant to your personal investment policy statement and in line with your unique tax strategy. Additionally, understanding the true value of complex capital assets requires strict accounting protocols, which will yield mark-to-market valuations at a moment’s notice.

INVESTMENT MANAGEMENT

Expertly Navigating the Ultra-High-Net-Worth Financial Ecosystem

We are a multi-disciplinary asset management and private equity firm built upon the core principles of trust, commitment to excellence, risk management, understanding the value of partnerships and total transparency.

Seeking investment outperformance in today's global marketplace requires extremely deep diligence across all asset classes, both public and private. We have built our firm on the principle of relentlessly pursuing information and conducting deep research, both inherently essential to delivering measured results.

- **Portfolio Management**
- **Middle Market Transactions**
- **Capital Introduction**
- **Alternative Investments**

ALTERNATIVE INVESTMENTS

A Sea of Exclusive Investment Opportunities At Your Fingertips

Our carefully curated, deep relationships within the ultra-high-net-worth community includes top-tier fund managers and a robust pipeline to exclusive, private deal flow and middle market transactions.

TAX AND ESTATE PLANNING STRATEGY

All-Encompassing Solutions to the Complex Tax & Estate Planning Landscapes

Reducing taxes can have an enormous impact on your overall wealth plan. Whether you are selling your business, have sold your business, are planning your next endeavor, or seeking to optimize your financial freedom, our in-house tax professionals will offer you leadership and strategies designed to minimize your taxes over time.

We focus on developing a holistic tax strategy - implementing controls to remain with current and future tax code, and preparing and filing tax forms.

Preservation and Protection for Your Wealth and Legacy

Your wealth has served you well, and you want it to continue to serve and secure your family for generations to come. We are experts in designing, drafting, and implementing the most prudent trust utilization. We also offer full CFO services for your family business and a complete suite of corporate and personal Trustee services.

A Dependable Manager for Efficient and Effective Charitable Giving

Whether your philanthropic focus lies in succession planning and legacy building, or the desire to advance social change, our offices are prepared to meet your charitable needs while taking advantage of the accompanying tax benefits.

PRIVATE BANKING

Strategic Safeguarding of Your Private Wealth

Working with you to build and implement a total budget, we analyze strategic utilization of credit, and by leveraging our credit partners, we can design efficient and attractive structures. We also streamline cash flow management, bill pay, and other logistical details to alleviate your everyday burdens.

A Guiding Light for Sustainable Generational Wealth

We work with you and your family through governance and education to address the topic of wealth and its impact on family life, values, culture, and happiness.

CONCIERGE SERVICES

A Faithful Steward for your Tailored, Around-The-Clock Needs

Unburden yourself from the worries of planning; whether it be mundane day-to-day trivialities, or the complexities of private international family travel. Our goal is to give you the time and energy to focus on what you consider most important, and leave the details to us.

REAL ESTATE

As An Investment or A Generational Home, Your Castle Beckons

Investment

Our exclusive relationship with an established and reliable General Contractor has yielded over a dozen investment projects in the South Florida market on behalf of Castle Island's principals, and clients. In addition, our alignment with major, national Real Estate Investment Trusts gives you a direct line to new investment opportunities.

Management

We have an acute specialty in managing real estate holdings - not only in Florida, but throughout the world. These initiatives include maintaining and coordinating professional support on all aspects of residential and commercial holdings.

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