



Coordinated Retirement Strategies

"Third Party Asset Manager - TAM"

A Targeted Approach

A "TAM" has the expertise that many investors and retirees count on when they have targeted goals, and expect their invested assets to be matched with these goals. When selecting the appropriate managers unique situation, time frame, income requirements and risk tolerance is key.

Adapting to you Changing Needs

As the world around us changes, so do our goals. Your portfolio must be able to adapt to any event that may arise. Your portfolio must be nimble enough to weather any storm, while keeping your interests, risk tolerance, time frames and other important objectives in focus. This active approach and communication provides results that can fall within expectations and give 'peace of mind'.

Portfolio Customization Available



Income-Tax Managed Investing Available

Annual Mgt. Fee

No Transaction Costs
No Commissions
No Withdrawal Charges

No Fee to Change Investment Model or TAM



Independent Investment Advice



Investment Flexibility

Receive Income "Plus"



Access to Investment Gains

Stay the course, weather the storm, reach your targeted goals.

When you reach retirement, you want to know that your funds are there for you and are performing the way they were intended. Customizing your portfolio and consistent management offers the ability to use funds for income, or target them for specific short or longer term goals.

"Live the Life that You Desire, Call Castle Wealth Strategies to Retire"

Important Disclosure: The information presented is provided for informational purposes only and not to be construed as a recommendation or solicitation.

Investors must make their own determination as to the appropriateness of an investment or strategy based on their specific investment objectives, financial status and risk tolerance. Past performance is not an indication of future results. Investments involve risk and the possible loss of principal.

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