CASTLE®
WEALTH ADVISORS
FINANCIAL ✠ INVESTMENT ✠ VALUATION

BEFORE YOU LET GO

Most families want to work with a knowledgeable financial advisor who has a team of experts backing them up. That is exactly what we at Castle Wealth Advisors, LLC provide.

Castle Wealth Advisors designs specific financial blueprints to manage assets for multiple generations within our clients' families and/or family businesses. We pull together the services of our three separate specialized companies in order to prepare tax and financial management decisions tailored to each specific family situation.

Business & Net Worth → Blueprint/ Transition → Protect Family Net Worth

Castle Valuation Group provides business valuations to assist business owners with succession planning inside the family, selling the business outside the family, stockholder valuation, bank lending, and other purposes. We specialize in a few industries and we know them very well.

Castle Wealth Advisors can also help you analyze your net worth and plan for the future.

Our senior financial consultants with Castle Wealth Advisors and Castle Valuation Group work together with business owners to develop a blueprint based on their goals. The blueprint must outline the most efficient way to sell the company with the least amount of income tax.

Estimating future retirement income from all assets is also important to look at before the sale is complete.

Castle Wealth Advisors helps most business owners with analyzing new ways to protect the owner's net worth in future years, which is typically an important goal. This process may include reviewing wills and trusts, reviewing ownership methods and beneficiaries.

We work with our clients to prepare the best diversification plan for their assets and to fit their financial goals. Castle Investment Advisors works closely with Castle Wealth Advisors to protect the family.

CASTLE® VALUATION GROUP

CASTLE® FINANCIAL GROUP

CASTLE® INVESTMENT ADVISORS

Castle Wealth Advisors, LLC
9820 Westpoint Drive ✠ Suite 200 ✠ Indianapolis, Indiana 46256.3363
317.849.9559 ✠ Fax 317.577.8575 ✠ www.Castle3.com

CASTLE®
WEALTH ADVISORS
FINANCIAL ✠ INVESTMENT ✠ VALUATION

WHAT WE DO

Succession/Exit Planning
Castle Wealth Advisors develops succession or transition plans for family business owners so that they can retire comfortably and know that there is a plan in place that moves the ownership to the next generation, or to someone outside the family.

Business Valuations
We provide valuations for family business owners for a variety of reasons including gifting stock to family members, selling the company to non-family members, divorce, probate, and retirement planning. The valuation of a company can be different for each of these situations, so working with a firm such as ours with a high level of experience in your industry is important.

Retirement Income Strategies
We develop retirement income strategies so that business owners are comfortable with their future retirement income. We aim to do this by minimizing income taxes and by providing ways to protect the company for the future. There are several ways to receive retirement income from a company and the tax impact can be different for each, which again is where Castle Wealth Advisors' expertise in this industry is helpful.

Business Financial Structure
We develop business growth strategies that are important for companies and families. When considering the prospect of opening a new store, for instance, questions arise. How should you own the real estate? Should you set up a new corporation? Who should own that corporation? Developing a business growth plan will help the owners in many different ways. Our firm can help with that process.

Business and Estate Documents
We review and help business owners and their attorneys and CPA's design estate documents to minimize estate taxes and protect closely-held family business assets. We understand the importance of these issues, and work as a part of the owner's team to be sure the plans properly reflect these priorities.

Protect Family Net Worth
We provide long term strategies to help protect and manage family wealth over many generations.

OUR TEAM

Gary Pittsford, CFP®, President and CEO, Castle Wealth Advisors, contact: Gary@Castle3.com.

Michael Kalscheur, CFP®, Senior Financial Consultant, Castle Financial Group, contact: Michael@Castle3.com.

Darren Nyce, CFA, Senior Research Analyst, Castle Investment Advisors, contact: Darren@Castle3.com.

John Wheeler, CFP®, CPA/PFS, **BCA** Senior Financial Consultant, Castle Valuation Group, contact: John@Castle3.com.

Ransom LeMay, ASA, CVA Financial Analyst, Castle Valuation Group, contact: Ransom@Castle3.com.

Benjamin Mart, Financial Analyst, Castle Wealth Advisors, contact: Benjamin@Castle3.com.

Castle Wealth Advisors, LLC
9820 Westpoint Drive ✠ Suite 200 ✠ Indianapolis, Indiana 46256.3363
317.849.9559 ✠ Fax 317.577.8575 ✠ www.Castle3.com