Fi360 CONFERENCE

APRIL 25-27 2018 SAN DIEGO CALIFORNIA

HILTON SAN DIEGO BAYFRONT

Heather Castle, CFP®, ChFC®, AIF®
Founder
Castle Wealth Advisors, LLC

Heather was in the financial services industry for 10 years prior to starting Castle Wealth Advisors, LLC over 2 years ago. She started Castle Wealth Advisors, LLC because she wanted to provide ethical and approachable financial planning and investment management to individuals and business owners, concerned with their financial futures, regardless of age, sex, race, or net worth.

She is a graduate of the University of Alabama, with both a B.S. in Finance and received her MBA from the Manderson School of Business and she has passed the following exams:

- Series 7, General Securities Representative
- Series 9 & 10, General Securities Sales Supervisor
- Series 66, Investment Advisor Representative
- California Life, Health, and Variable Insurance (License # 0K01554)

Over her career Heather felt a need to dive deeper into financial planning and her work with high net worth individuals who have greater planning and investing needs. She specializes in:

- Women in transition (divorce/ death)
- Corporate Executives
- Young Entrepreneurs
- Small Business Owners
- Family With Special Needs Members
- Complex Retirement and Estate Planning Needs

Heather is also an adjunct finance professor at California State University, Northridge (CSUN) where she teaches FIN 440 - Reitrement Plans and Employee Benefits and FIN 302 - Presonal Finances. Currently she lives in Brentwood and enjoys the West Side of Los Angeles. She is the Training & Education Chair for the Junior League of Los Angeles.