CASTLEMARK
WEALTH MANAGEMENT

"A long-term view to steady growth with managed risk. WE'LL GUIDE AND MENTOR YOU TO A SOLID FINANCIAL FUTURE." – Robyn

WEALTH MANAGEMENT

"Call me – I'm here to help."

ROBYN K. THOMPSON, CFP®, CIM®, FCSI®
PRESIDENT

At Castlemark Wealth Management Inc., we never forget whose money it is: Yours. By choosing Castlemark you will gain access to some of Canada's leading risk-management experts providing customized professional investment management.

At Castlemark, we work only with a select group of distinguished money managers to ensure you get the right fit. Our investment approach combines low-cost, tax-efficient indexed investment strategies with targeted active management strategies and sophisticated risk-mitigation and income-enhancement techniques to maximize client returns at any risk level.

The unique approach we use boils down to what we call "The Wealth Effect." While the type of securities you hold (asset mix) and the choice of securities (security selection) are important, research has shown that other factors can have a big impact on wealth creation. Tax-efficiency, for example, is critical (see the accompanying graph), because great performance is useless ▸▸

if the taxman takes most of it away. So we focus on balancing all the elements that contribute to wealth creation and preservation.

We also laser-focus on risk management. A portfolio with lower volatility (that is, ups and downs in value relative to the market) is worth more over the long run than one that swings widely. Our aim is to keep those swings to a minimum. That will let you sleep nights. And that will significantly increase the probability that you'll achieve your financial goals.

"AT CASTLEMARK, WE TAKE EXTRA TIME TO DETERMINE YOUR TRUE INVESTMENT PROFILE. Then we work closely with portfolio experts to create portfolio recommendations that meet our exacting standards for risk and return." – Robyn

To ensure the highest level of investment integrity and commitment to client service, Robyn K. Thompson, President of Castlemark Wealth Management, retains the position of Vice-President and Investment Strategist at R.N. Croft Financial Group Inc. (Castlemark Wealth Management has no beneficial interest in or other ownership relationship with R.N. Croft Financial Group Inc.).

THE WEALTH EFFECT

THE RELATIVE IMPACT KEY FACTORS HAVE ON YOUR PORTFOLIO