



ELIGIBILITY

What are the requirements to become an investor?

Both individuals and entities can be investors at CFSG.

Identification and Verification

Individual investors must be at least 18 years old, have a valid social security number, and have their identity successfully verified by CFSG.

Family trusts, companies and other organizations will need to contact us at (877) 640-9393 or castleberryfinancialservices.com for identity verification purposes in order to become investors.

Account and Investment Minimums

Currently, there is a minimum investment in Alternative Investment Accounts. Investors may invest as little as \$100,000.00 and up to \$100,000,000.00 in CFSG.

IRA Rollover has no minimum investment and CFSG pays the fees with Mainstar Trust.

Different Account Types

CFSG offers a variety of account types to meet your investing needs. We offer individual accounts, joint accounts, trust accounts, corporate accounts, and custodial/minor accounts. Open an account today.

Investment Duration

Investors should be prepared to hold their investment to maturity. Currently, investments CFSG have 1 year, 3 year and 5 year terms at origination.

