



What is the process to begin investing?

1. Open an account and transfer funds.

To begin investing at CFSG you must open a Alternative Investment Account at CFSG. Whether you want to invest as an individual, a corporation, for a minor, or through a joint or trust account, we offer an account type to fit your needs. Open an account today.

It is easy to transfer money to your Alternative Investment Account from a bank account.

2. Build your portfolio.

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

3. Receive payments of interest.

CFSG makes monthly, quarterly and annually interest payments to investors. Your portion of each interest net of CFSG's Alternative Investment Account is automatically credited to your account as it is received by CSFG.

4. IRA Rollover/401k

Has no minimums and CFSG pays all fees with Mainstar Trust.

5. Reinvest or withdraw funds.

It is easy to reinvest the cash you receive from interest payments by contacting CFSG at 877-640-9393 or castleberryfinancialservices.com

You may withdraw your available cash at any time by scheduling a transfer to your bank account.