

Kelly Castleberry, III, CIMA®
Senior Vice President
Family Wealth Advisor

Who I Am

With nearly 30 years of experience, Kelly takes a holistic approach in consulting to high net worth families. He understands that more than a strictly investment-focused approach is required to meet the multi-generational needs of wealthy families and he brings to the table advanced competencies in addressing wealth transference, gifting and philanthropic objectives and the challenges posed by closely held businesses.

My Experience

Kelly is a Certified Investment Management Analyst (CIMASM) as well as an Accredited Investment Fiduciary®. He has also attained the title of Family Wealth Director focusing on wealth transference, asset protection strategies, philanthropic services, family governance and dynamics, and trust services.

Specialty Areas

- Family office strategies and support, including:
 - Investment management
 - Liability management
 - Philanthropic planning
 - Estate planning
 - Education planning
- Intergenerational wealth transference
- Tax advantaged investing
- Liquidity event planning
- Retirement planning

Related Experience

Kelly has always had a deep commitment to his community and has served on innumerable charitable boards. He is currently affiliated with the Childhood Language Center, the Clay Center for the Arts & Sciences, the Buckskin Council of the Boy Scouts of America, the Fellowship of Christian Athletes, and the YMCA of the Kanawha Valley. He was formerly a Board member of the Thomas Memorial Hospital Foundation, including a three-year term as President.