



Kelly L. Castleberry, III, CIMA®  
Senior Vice President – Wealth Management  
Family Wealth Advisor

With over 30 years of experience, Kelly takes a holistic approach in consulting to high net worth families. He understands that more than a strictly investment-centric approach is required to help meet the multi-generational needs to wealthy families. He brings advance competencies to the table that address wealth transference, gifting and philanthropic services, family governance and dynamics, and trust services.

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. In 2019, he was awarded Morgan Stanley's President's Club Community Leadership award in recognition of his charitable initiatives.

#### Focus 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

Securities Agent: WV, TX, WI, WA, VA, TN, SD, SC, RI, PA, OH, NY, NM, NJ, NH, NC, MO, MN, MI, ME, MD, MA, LA, KY, KS, IN, IL, GA, FL, DE, DC, CT, CO, AZ, AK; General Securities Representative, Investment Advisor Representative.