

A team you can count on!



GLOBAL VIEW CAPITAL[®]
M A N A G E M E N T

Global View Capital Management, Ltd. a SEC-Registered Investment Advisor, offers a unified managed account program with over 100 managed account strategies offered from 20 institutional money management firms. The advancements in technology, trading platforms and exchange-traded products have enabled the average investor to access asset classes and trading strategies that were not previously available for the average retail investor. The actively managed, non-correlated strategies, when combined in one simple portfolio, deliver a highly sophisticated form of diversification with an emphasis on downside protection.

QUICK FACTS

- Over 20 Money Manager Firms
- Over 100 Separately Managed Account Strategies
- Over 100 Mutual Fund & ETF Selections

Large Account Program

- \$15,000 account minimum
- 1.0% program fee plus maximum 1.4% advisor fee

Small Account Program

- \$2,000-\$15,000 account minimum
- .50 -.75% program fee plus maximum 1.4% advisor fee

Low-Cost Account Program

- \$2,000 account minimum
- .40% program fee plus maximum 1.4% advisor fee

One Simple Portfolio

INSTITUTIONAL-QUALITY DIVERSIFICATION

MONEY MANAGERS

CUSTODIANS Interactive Brokers

Investment Advisory Services

- Unified Managed Accounts
- Multi-Strategy Portfolios
- Mutual Fund Wrap Program
- ETF Index Portfolios
- Tactical & Strategic ETF Strategies
- Dimensional Fund Advisors (DFA) Fund Solution
- Variable Insurance Sub-Account Portfolios

Investment Options

- Exchange Traded Funds
- Mutual Funds
- Individual Stocks & Bonds
- Municipal Bonds
- Master Limited Partnerships
- Variable Insurance Sub-Accounts
- Options Strategies

Investment Methodologies

- Tactical Analysis Approach
- Strategic Analysis Approach
- Dynamic Analysis Approach
- Traditional Modern Portfolio Approach

Powered by:



Built by and for leading-edge advisors, Castleview Partners' integrated, end-to-end technology platform puts the best digital tools at the fingertips of advisors determined to efficiently deliver service quality to their clients. Through a state-of-the-art dashboard, advisors manage the entire client lifecycle, from proposal generation to account opening to account management (trading and rebalancing) to financial planning to reporting. This technology platform is complemented by a carefully curated best-of-breed, open architecture investment platform.

PAST PERFORMANCE MAY NOT BE INDICATIVE OF FUTURE RESULTS. Investment Advisory Services offered through Global View Capital Management, Ltd. - A SEC Registered Investment Advisor that provides certain investment advisory services through the Castleview Partners platform. Castleview Partners, LLC and Global View Capital Management, Ltd. are not affiliated companies. More information on both companies can be found on SEC.gov. Diversification may not eliminate the risk of investment loss. Not FDIC Insured. No Bank Guarantee. May Lose Value.