



*Unparalleled Property Services*







## Who We Are

Castle Group is the premier choice for property management, specializing in serving the finest residential communities. The company's philosophy is an unwavering focus on the Resident experience; at Castle it is called Royal Service®. Castle was founded by James Donnelly and his partners, Craig Vaughan and Rob Donnelly. Since no two properties are identical, Castle has created a menu of services that allows customers to create a solution that fits their needs. Castle does not manage an exceptional number of communities, just a number of exceptional ones.

## Castle Services

- Association Management for Condominium and Homeowner Associations
- Accounting and Financial Support
- Options for Self-Managed Communities
- Developer Services
- Lifestyle and Social Management
- Food & Beverage Management

## What We Provide

Castle Group offers a distinctive management approach that is flexible and customized to meet the needs of your Community.

## Association Management Services

Castle Group's Association Management team provides a complete array of services to operate the administrative, financial, physical, and people aspects of your Community Association. We have organized our company around supporting the operations of the on-site teams.

## We employ specialists in:

- High-Rise and Condominium Communities
- Large-Scale Communities
- Self-Managed Communities
- Food & Beverage Management
- Project Management/ Engineering
- Finance and Accounting
- Lifestyle Services



## Founders and Executive Team

Exceptional service begins with exceptional leadership. Castle was founded by James Donnelly and his partners, Craig Vaughan and Rob Donnelly – Florida Residents who have all of the resources and necessary experience to meet your Association’s goals and objectives. You have direct access to Castle’s founders every day. In addition, we have the best team of Vice Presidents, Directors and Managers in the business. We are extremely proud of our team.



**James Donnelly**

Founder & Chief Executive Officer

James is the founder and visionary of one of the most successful property services firms in the property management industry. He is an energetic, effective and amiable leader with over 30 years of experience serving communities. James is an accountant and a product of Big Eight accounting training. He is also a Licensed Community Association Manager, a Licensed General Contractor and a highly sought-after industry speaker.



**Craig Vaughan**

Founder & Chief Financial Office

As an accountant and a Licensed Community Association Manager, Craig is a dynamic and creative leader with a wealth of financial knowledge. He has often been described as Castle’s “culture driver”. Craig is extremely proud of his role in leading Castle to multiple Best Places to Work awards, as recognized by the South Florida Business Journal.



**Rob Donnelly**

Founder & Chief Operating Officer

Rob is the “nuts and bolts” leader of Castle Group. With over 30 years of hands-on experience, no one knows the mechanics of Community Association services like Rob. He has earned the industry’s highest accreditation, the Professional Community Association Manager (PCAM) and also holds LCAM, AMS, and CMCA designations.





**Will Delgado**  
President

Will brings over 30 years of operations experience to Castle Group. He is a former Army officer with over a decade of leadership experience in infantry and special operations units. Following a successful transition from the military, Will held senior management positions in both publicly traded and privately held companies. An MBA graduate from Rutgers University, he has successfully managed all stages of high-rise tower and HOA projects from initial design through Developer turnover.



**Jordan Goldman**  
Executive Vice President

Often described as having an infectious personality, Jordan is an incredibly dynamic, energetic, and versatile leader. He brings over twenty years of real estate development, project management, property management, and leadership experience to Castle. In his present role as Executive Vice President, he leads Castle Group's branding, marketing, sales, and strategic growth initiatives.



**Kristen Searle**  
Vice President of Human Resources

Kristen has extensive experience in all areas of Human Resources including talent acquisition, onboarding, performance management, employee relations, training and development, as well as compensation and benefits. She has a passion for assisting employees in accomplishing their personal and professional goals as well as partnering with business leaders in organizational development and success.

**“  
WE ARE  
CASTLE  
GROUP,  
”**

# VISION & VALUES

PERSONAL  
GROWTH

INNOVATION  
CONTRIBUTION INTEGRITY

To enhance the lives of our team, customers and the community through the provision of  
**UNPARALLELED PROPERTY SERVICES.**

**OUR CORE  
PURPOSE**  
is to be proud of  
everything we do.



TOLERANCE  
LIFE ———  
BALANCE

**TEAM**





## The Best People

Castle attracts, trains and retains the most exceptional employees in the management industry. We accomplish this through a highly detailed selection process and continuous training. Being voted a “Best Place to Work” for multiple years has reinforced this sentiment.

## The Best Systems

We understand that timely and relevant information is critical to the success in operating a property. We believe communication between Castle, the Directors, and residents is key. Castle has the ability to customize a dashboard that will allow the Board online access to real-time financial and operational information as well as any specific metrics they would like to monitor.



## The Best Technology

Castle’s focus on technology is unmatched in the community association management industry. We employ a staff of programmers whose sole focus is to create tools that increase efficiency in the associations we manage. This is accomplished by overlapping best practices and customized technology solutions for each of our customers.





## Selection & Training

Before a candidate is offered employment with Castle, we conduct a thorough background check. This includes license and education verification, a criminal background search, as well as a pre-employment drug screening.

Candidates also undergo an in depth skills examination, are tested in technology proficiency and are given a personality assessment. We utilize these results to assist us in identifying the top talent in the industry.

All members of our team complete an extensive new hire orientation process, which includes formal training in Castle's Royal Service<sup>®</sup> key fundamentals.

At Castle, we believe the resident experience is enhanced by providing the highest level of customer service. Site-specific training is also included as supplemental training, based upon the Community's needs and requests.







## Why Professional Management

**Experience** - Through years of trial and error, Professional Association Management companies specialize in bringing industry best practices to your community.

**Personnel** - A management company can provide a full team of trained management professionals and take on all of the human resources, payroll, training, insurance, and other employer responsibilities. This includes recruiting replacement personnel if required.

**Compliance** - Management companies can ensure your Association stays in compliance with the ever-changing regulatory environment.

**Technology** - Management companies have state of the art technology in the areas of communication, web applications, security, finance, reporting, and resident convenience.

**24 /7 Coverage** - Most management companies have 24/7 coverage, and licensed staff on call for all Association emergencies.

**Cost Savings** - Through economies of scale and better visibility to market pricing, professional management companies can identify areas of cost savings. In most cases, professional management companies provide a higher level of service at a lower cost.





## Royal Service®

Castle's focus is to create an unparalleled resident experience for owners living in Castle managed communities.

After attending the Ritz Carlton's Legendary Service School, James Donnelly and his team created Castle's Royal Service® program. Royal Service® has many detailed components. Ultimately, it's about creating an environment where every resident feels important and cared for. We warmly welcome and greet our residents, anticipate their needs and ultimately exceed their expectations. Castle Group is dedicated to providing Royal Service® to every resident and guest allowing them to experience their community through the highest level of professionalism and attention to detail. It is our goal to create memorable moments at every opportunity when interacting with Directors, residents, guests and vendors.







## Accounting & Financial

Castle Group offers accounting insight not found with other property management companies. Our Community Accountants are dedicated to your community, and we work closely with your Board of Directors to gain a true understanding of the financial nuances of your community. We analyze your Association's financial position and benchmark expenses against other similar operations. This process, which we call the "Castle Value Challenge", allows us to identify cost savings opportunities and streamline expenses.

On a monthly basis, we provide your Board of Directors with a report of the current financial data along with our analysis and recommendations.







## Association Management

Castle's Association Management team provides a complete suite of services to operate the administrative, financial, physical and people aspects of your Community Association. We have organized our company to provide specialized services for homeowner Associations, low-rise condominiums, high-rise condominiums, and self-managed properties. We recognize that the operations of each of these types of associations is unique and requires specific expertise and experience to operate at the highest level.







## Lifestyle Services

We believe that in order to build a sense of community an Association must offer a variety of fun and interesting activities that will engage the members of the community. At Castle, we have developed a Lifestyle Services Group to coordinate specialized social offerings that include entertainment, fitness, crafts, dancing, games, lecture series, language studies, sports, movies, and much more. Many residents enjoy volunteering for community programs, and we encourage their participation. Using our extensive resources and event planning systems, we work with our residents to identify and implement activities and programs in which they have the greatest interest.







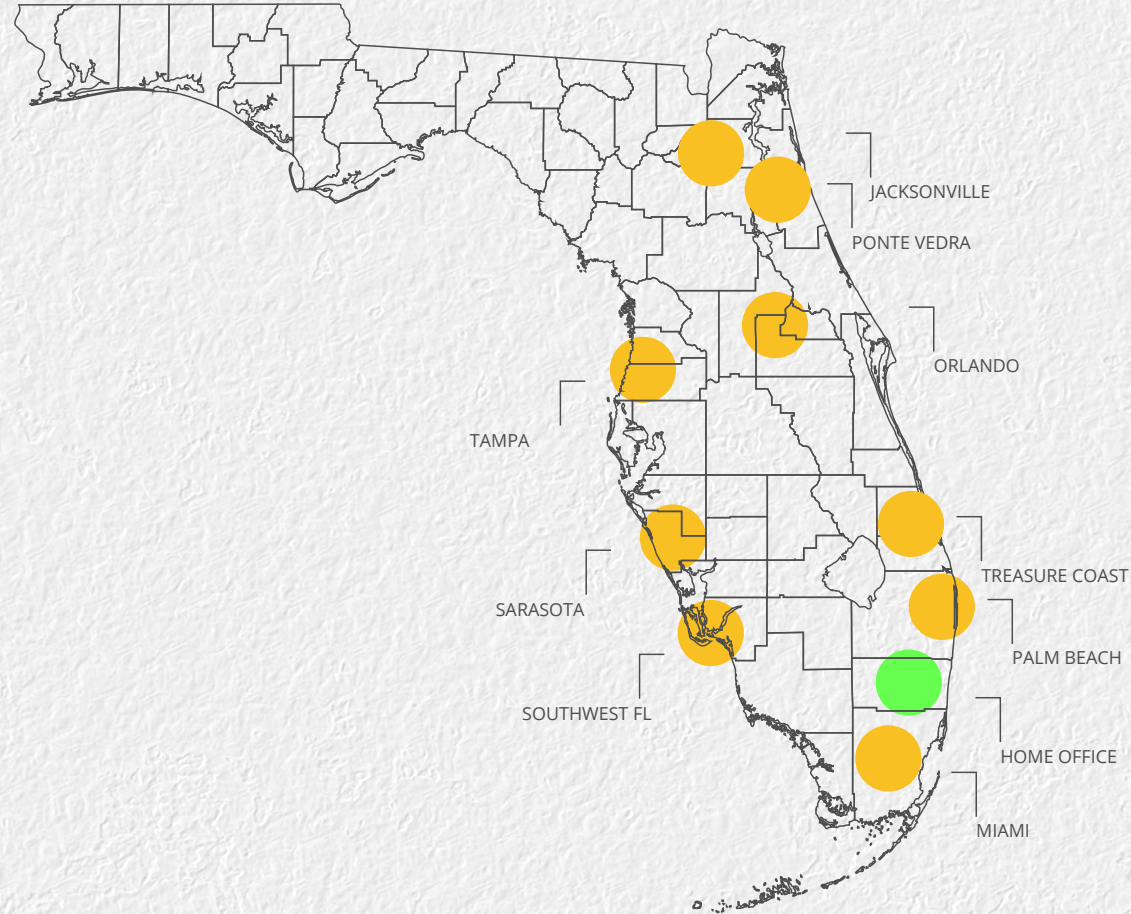
## CastleCares®

CastleCares® was officially formed in 2010 with the vision of developing our already strong philanthropic base. CastleCares® meets monthly with volunteers from our team of over 1,900 dedicated Castle Group employees. These compassionate individuals volunteer their time and talent to organize positive and effective ways of giving back to communities in which we serve.

CastleCares® mission is to support children and families in need throughout the State of Florida. Each year CastleCares® donates a percentage of our profits to various worthy organizations and contributes thousands of volunteer service hours to support those less fortunate. Castle Group is very proud of the accomplishments made possible by our outstanding, caring, and giving employees through their participation in CastleCares®.







## Locations

Castle's reach is primarily focused on communities within Florida. This strategic decision allows us to be concentrated on the nuances of Florida's unique and ever-changing community Association industry. Castle's offices have been strategically positioned throughout the state to allow us to provide the highest level of service to your community.

Offices throughout Florida to serve you

- Broward | Home Office
- Jacksonville
- Miami
- Orlando
- Palm Beach
- Ponte Vedra
- Sarasota
- Southwest Florida
- Tampa
- Treasure Coast





### Home Office

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