



*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®. 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



## Executive Team

Exceptional service begins with exceptional leadership. James Donnelly and his partners founded Castle with a simple mission- to enhance the lives of our team, customers and community through the provision of unparalleled property services. You will have direct access to Castle's executive team. In addition, we have an expansive team of Vice Presidents, Directors and Managers that specialize in all facets of property management. We are extremely proud of our team.



**James Donnelly**  
Founder

James is the Founder of Castle Group. James has over 30 years of experience serving residential communities. He is a prominent speaker in the industry, a passionate community leader, and a benefactor of numerous philanthropic organizations. James was appointed to the Nova Southeastern University Board of Trustees and founded the NSU James Donnelly Property Management and Real Estate Bachelor of Science program.



**Jordan Goldman**  
Chief Executive Officer

Jordan Goldman is the Chief Executive Officer of Castle Group. Often described as having an infectious personality, he is an incredibly dynamic, energetic, and versatile leader with over twenty years of real estate development, project management, property management and leadership experience. Before joining Castle, he held numerous leadership positions for one of the nation's largest homebuilders, leading the Florida team to several first place JD Power award finishes.



**Craig Vaughan**  
Chief Financial Officer

As an accountant and 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.



**Will Delgado**  
President

Will brings over 35 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 mixed-use projects from initial design through Developer turnover.



**Kristen Searle**  
Chief Operating Officer

Kristen began her Castle career in Human Resources, driving strategic change in talent and operations management. With a comprehensive HR background, she brings a strategic and collaborative approach to optimizing processes and aligning strategic initiatives with company goals. Her leadership fosters a thriving organizational culture, ensures operational excellence, and delivers innovative solutions that support long-term growth and client success.



**James Schumaker**  
Executive Vice President

James is a real estate veteran with over 25 years of operational and business development leadership. James has led companies in both a national and global footprint, creating strategic alliances and partnerships focusing on exceeding the client expectations. James held Board positions with Families First, KidSafe, and Boys and Girls Club to help further give back to our communities and invest in children and family health and well-being. James has both a Florida Real Estate license and a Florida CAM license.



**Brian Street**  
Executive Vice President of Field Operations

As a Civil Engineer, Brian brings a valuable perspective to his Executive Vice President of Operations role. He joined Castle Group in July 2011, getting a true understanding of the industry as a Community Association Manager. From his time as Regional Director of the Broward area to Vice President, Sr. Vice President, and now Executive Vice President of Operations, Brian has played a pivotal role in the overall development of Castle as a leader in the industry.

# 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.**

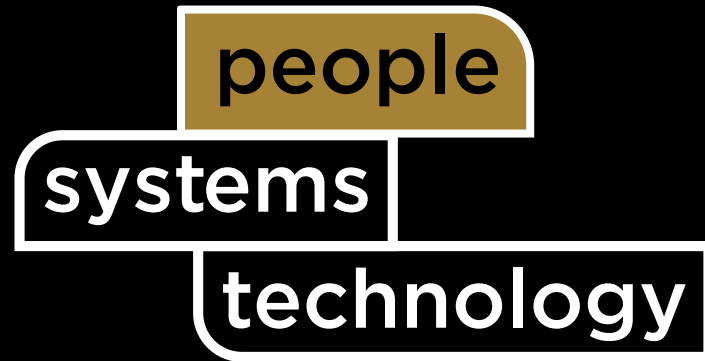
**OUR CORE PURPOSE**  
is to be proud of everything we do.

**NEE**

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.







## 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, Founder & Chairman, 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.





## 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.





## 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.



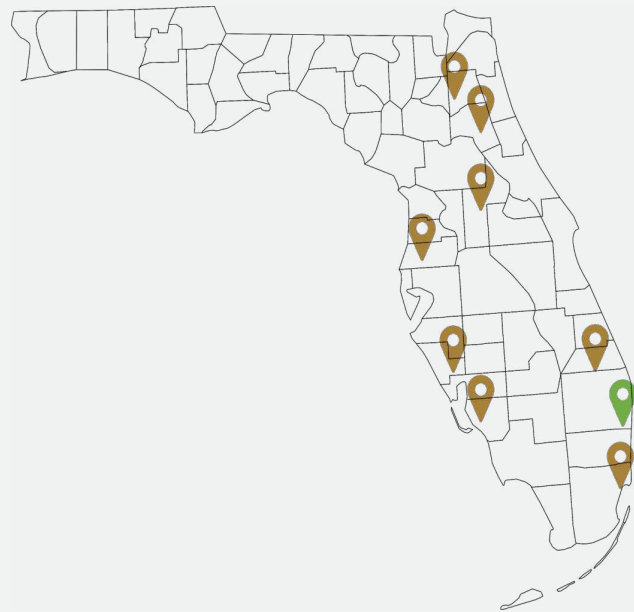


## CastleCares®

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 2,500+ 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

### Home Office – Plantation

12270 SW 3rd Street, Suite 200  
Plantation, FL 33325

### Palm Beach

500 S. Australian Ave., Suite 700  
West Palm Beach, FL 33401

### Treasure Coast

10807 SW Tradition Square  
Port St. Lucie, FL 34987

### Orlando

111 North Orange Avenue, Suite 800  
Orlando, FL 32801

### Ponte Vedra

10033 Sawgrass Drive West, Suite 123  
Ponte Vedra Beach, FL 32082

### Southwest FL

21101 Design Parc Lane, Suite 102  
Estero, FL 33928

### Sarasota

6311 Atrium Drive, Suite 209  
Lakewood Ranch, FL 34202

### Tampa

6301 Memorial Highway, Suite 103  
Tampa, FL 33615

### Jacksonville

10752 Deerwood Park Boulevard  
South Waterview II Suite 100  
Jacksonville, FL 32256

### Dallas

6860 North Dallas Parkway, Suite 200  
Plano, TX 75024





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ROYAL<sup>®</sup>  
SERVICE

