

CastleOak Securities, L.P. Expands Into Private Capital Advisory

Experienced Hires Help Broaden Offerings to Serve Clients

NEW YORK, NY, UNITED STATES, March 6, 2025 /EINPresswire.com/ -- CastleOak Securities, L.P. ("CastleOak"), a leading New York-based boutique investment banking firm, is pleased to announce its expansion into [Private Capital Advisory \(PCA\)](#).



The newly formed group will act as a comprehensive fund advisory partner to financial sponsors and alternative asset investors, providing tailored guidance and creative structuring to help achieve client goals. The team's core focus will be on both Secondaries Advisory, providing advisory and liquidity solutions for limited and general partners in private capital funds, and Primary Fundraising providing longer-term and bespoke capital raising solutions for select sponsors.

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Steven Andrews

The group is headed by Steven Andrews, who recently joined the firm from RBC Capital Markets, where he co-headed the Alternative & Private Capital Solutions group and led the Sponsor Coverage group for the Markets division. Prior to that, Mr. Andrews held multiple senior roles during his long-standing career at Citigroup.

"CastleOak has provided me a great platform that I can leverage to launch this new business and team. There are

numerous synergies with CastleOak's existing business lines across capital markets and advisory. I'm excited to work with general and limited partners to develop creative, thoughtful liquidity solutions for their private equity, private credit, and real assets holdings.” said Steven Andrews.

PCA secondaries bankers will work closely with CastleOak's already established Mergers & Acquisitions (“M&A”) practice bankers, led by Reginald Hollinger. The combined team, named Financial Advisory, will be able to deliver superior, thoughtful solutions and leverage the full

capabilities of the broader CastleOak organization with respect to distribution and advice, taking advantage of long-term relationships and partnerships.

“CastleOak is pleased to offer a complement to our robust client service solutions with the addition of our PCA team. Our long-standing M&A franchise has already developed a solid track record in the advisory space that we can build on.” said David R. Jones, President and Chief Executive Officer of CastleOak. “We are excited to look for new ways to add value to our longstanding clients.”

For more information on the CastleOak’s Private Capital Advisory group, please visit CastleOak's website.

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