Castle Island Wealth successfully completes acquisition of Longhorn Investments

"Strategic Move Enhances Investment Capabilities and Expands Client Offerings"

NORTH PALM BEACH, FL, UNITED STATES, January 7, 2026 /EINPresswire.com/ -- Castle Island Wealth Acquires Longhorn Investments and Welcomes Founder Bill Urquhart as Senior Advisor

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>
> *Kevin McCluskey*

Castle Island Wealth is pleased to announce the acquisition of Longhorn Investments, a well-established South Florida registered investment advisory firm founded and led by Bill Urquhart, CPA, who will join Castle Island Wealth as a Senior Advisor.

For more than two decades, Bill successfully built Longhorn Investments into a respected advisory firm known for disciplined investment management, thoughtful planning, and enduring client relationships. His background as both an experienced advisor and a Certified Public Accountant further strengthens Castle Island Wealth's fully integrated wealth, tax, and planning platform.

“Castle Island is honored and excited to welcome Bill and the Longhorn Investments clients to our firm,” said Kevin McCluskey, Founder & CEO of Castle Island Wealth. “Bill has built an exceptional practice grounded in trust and long-term relationships. His experience as an RIA founder and CPA aligns seamlessly with our firm's commitment to comprehensive planning, continuity, and high-touch client service.”

As part of the transaction, Longhorn Investments' clients will gain access to Castle Island Wealth's broader advisory team, integrated CPA resources, and expanded planning capabilities, while continuing to work closely with Bill in his new role. The transition reflects a shared philosophy centered on client-first decision making, independence, and thoughtful long-term stewardship.

“I'm incredibly proud of what we built at Longhorn Investments,” said Bill Urquhart. “After careful consideration, it became clear that Castle Island Wealth was the right long-term partner—for me and, most importantly, for our clients. Their depth of talent, integrated tax expertise, and commitment to relationships closely mirror the values that have guided my career. I'm excited to continue serving clients as part of the Castle Island team.”

The acquisition represents another strategic step in Castle Island Wealth’s long-term growth strategy, focused on partnering with experienced advisors who value continuity, culture, and client care. The firm has a long history of working with advisor-owners across Florida to provide succession solutions that preserve relationships and enhance service without disruption.

About Castle Island Wealth
Castle Island Wealth is a Florida-based registered investment advisor providing comprehensive wealth management, financial planning, tax planning and filing, and estate coordination services. With a fully integrated CPA platform and a 16-person team, the firm serves high-net-worth and ultra-high-net-worth families, business owners, and multigenerational clients across Florida and beyond. Castle Island Wealth is headquartered in North Palm Beach, Florida.

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