



CASTINE CLIPPER

4th Quarter, 2025

THANK YOU and HAPPY HOLIDAYS!

All of us at Castine would like to thank you for your partnership throughout 2025. It's been a year of positive changes and none of it would be possible without you.

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Starting with our acquisition of the outstanding ResearchPool Research Management System (RMS) at the beginning of the year, our work continued throughout the United Kingdom and the EU on the re-introduction of commission sharing, overhauling the look and feel of the products, scalability, and all the behind-the-scenes work on infrastructure, development, marketing, sales, and much more... it's been a busy and exciting time.

We're building more of a "continuum" concept into our products, where it's easier to add new modules than before. For example, you can use Castine for due diligence and then move directly into the RMS, budgeting, research evaluation, contract and agreement management, approval workflow, and payments. All from Castine – when and where you need it.

Finally, we want to wish you a very nice holiday season. We love having you as a part of the Castine family and hope that 2026 will be a healthy, productive, and joyous year for you.

Best Wishes, Robin Hodgkins, President





CASTINE ACHIEVES ISO 27001 CERTIFICATION

Castine Consulting has extended its commitment to best practices and client data security with its new ISO 27001 certification.

ISO 27001 is an internationally recognized standard for information security management, developed by the International Organization for Standardization (ISO) and the International Electrotechnical Commission (IEC).

"Earning this certification means that our clients can have even greater confidence that we are following the highest standards and industry best practices in protecting data confidentiality and defending against cyber-security threats," said Robin Hodgkins, Castine's president. "We're proud to have met this standard and demonstrate our commitment to data security."

ISO 27001 certification recognizes an organization's commitment to meeting the highest standards of IT security and to implementing appropriate risk mitigation measures. To earn certification, an organization has to demonstrate that it is taking appropriate measures to protect its data, that it is actively working to prevent data breaches and that it complies with all relevant industry regulations and standards.

"Castine has always had the highest commitment to client security," said Fernando Neto, Castine's Head of Infrastructure. "ISO 27001 reflects the strength of our governance and how we manage information security as a system. It exists in parallel with our ongoing application and network penetration testing, PCI DSS certifications, and team training."

ABOUT CASTINE

For over 30 years, Castine has been the trusted, independent partner to asset managers and brokers worldwide. Its state-of-the-art "practitioner-built" solutions span Commission Management, Research Management, Broker Evaluations, Compensation, and Compliance, supported by a customer service team recognized as the best in the industry. Castine has consistently been at the forefront of dialogue on Commission Management market structure, helping firms anticipate regulatory change and adapt with confidence.

With the recent acquisition of ResearchPool, Castine delivers a fully integrated research lifecycle continuum, from due diligence to full research management



and contract management, and from budgeting and evaluation to payments, compliance, and reporting.

Castine is independently owned (unlike competitors that are subsidiaries of larger entities), and 100% unconflicted, ensuring a total focus on serving clients, and empowering them to scale their businesses with efficiency, transparency, and trust. Castine operates globally, with teams in the US, the UK, Portugal, France, and Argentina.

