

LOTUS WEALTH MANAGEMENT

We Specialise In

At Lotus Wealth Management we help you make informed decisions and build your future wealth.

The sooner you start thinking and working towards your financial future, the better your money will work for you to achieve your goals.

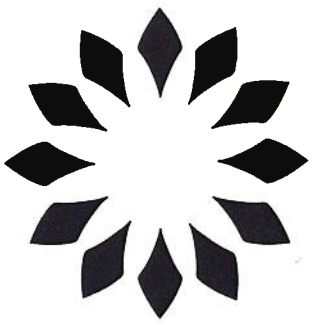
- ✔ Strategy Planning – tailored financial strategies to suit your needs, goals & lifestyle
- ✔ Personal Wealth Protection Strategies
- ✔ Building a sustainable Wealth Accumulation plan with you
- ✔ Retirement Planning that allows you better control of your money
- ✔ Portfolio Construction & Asset Allocation to support your needs
- ✔ Superannuation Strategies including SMSF to suit your evolving lifestyle
- ✔ Investment Management Inc & Direct Equities based on your risk comfort levels



Con Stamatelos B Bus, Dip FS
Director & Financial Adviser

Having over 10 years' experience in the Financial Services industry, my focus is to deliver clear, efficient and effective advice to ensure all our clients achieve their lifestyle and financial objectives.

I hold a Bachelor of Business Degree majoring in Accounting as well as an Advanced Diploma of Financial Services. I am a Practitioner Member of the Financial Planning Association of Australia (FPA) as well as a member of the Self-Managed Superannuation Professional Association of Australia (SPAA) and an Authorised Representative of ChpW Financial Pty Ltd.



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The True Value of Advice

There's plenty to consider when trying to secure your financial future. Should I pay off the mortgage or put money into super.... but what about renovations? When can I stop work? How do I afford the children's education?

Good financial advice answers these questions by mapping out your goals and putting in place the strategy to achieve them. The traditional measures of financial advice success have focused on achieving your tangible goals, such as retiring earlier, relative investment returns, or simply spending less.

While these financial benefits of advice have long been established, can financial advice positively affect the more intangible aspects of our lives? What is the true value of advice? The intangible value of advice.

312 financial advice clients were surveyed⁽¹⁾ about the intangible benefits of financial advice and the results were compelling.

The survey revealed people who receive ongoing financial planning advice experience:

13%

Greater levels of overall personal happiness

21%

Overall increase in peace of mind

20%

Increased feelings of security regarding their day to day finance

19%

Less likelihood to have arguments with loved ones

While those that don't receive financial advice were:

22%

More likely to have their sleep disrupted due to money concerns

15%

more likely to feel stress and anxiety

11%

more likely to feel concerned about their finances

IOOF True Value of Advice, Dec 2015 ⁽¹⁾

What's more, **83 per cent** of clients surveyed endorsed the value of financial advice by saying it's also important for their loved ones to have good financial advice!

Even if you have your financial house in order, a financial adviser provides the comfort and peace of mind of a well thought out plan, a plan that leaves you better prepared for the future. What's more, advice extends beyond measurable financial gains, to improved physical health, stronger relationships and personal happiness. That's the true value of advice.

For more details on your super, retirement planning, investments and more Contact Lotus Wealth Management Directly!

Con Stamatelos B Bus, Dip FS
Director & Financial Advisor

Ground Level 17-19 Chessell Street
Southbank, VIC 3006

PO Box 573
South Yarra, VIC 3141

P: (03) 9190 8930
M: 0412 767 71

E: con@lotuswealth.com.au
W: www.lotuswealth.com.au

Authorised Representative No. 290702 of CHPW Financial Pty Ltd AFSL No. 280201