



# Lewis Financial Advisory Group – Financial Partners for Life

Secure your financial future with a trusted mountains business.

**L**ewis Financial Advisory Group understands the pressure of financial security in today's volatile economy. The Lewis family have been providing sound financial advice to the people of the lower Blue Mountains for over 25 years. A family owned and run business Lewis Financial, backed by the reputation of Hillross Financial Services, have guided many clients and can guide you through the current economic crisis and plan for a brighter future.

## The family

Max Lewis and his wife Jan have lived in the Blue Mountains for 40 years. Their three children grew up here, attending Blue Mountains Grammar School, and Josh and Shani have since followed in their father's footsteps, Josh as Managing Director and Shani as Practice Manager within the long standing family business. Josh has recently celebrated the birth of his first child, a daughter and Shani, who joined the practice in 2006 after ten years in the legal profession, is a mother of two girls.

The Lewis clan have been active in the mountains community for a number of years through their love of sports. The family have been involved with the Glenbrook Swimming Club for over 20 years and last

year Max competed at the World Masters swimming championships in Perth. Josh played competitive rugby with Blue Mountains Rugby Union club and Lewis Financial Advisory Group are sponsors of both the Blue Mountains Rugby Club and Glenbrook Swimming Club.

## Services

Lewis Financial offer a highly personalised, professional service and are not product driven. They specialise in the fields of:

- Investment advice and retirement planning
- Self-managed Superannuation Funds, Corporate Superannuation and Personal Superannuation
- Portfolio Construction and Management
- Life Insurance and Income Protection

Let Lewis Financial Advisory Group help you make the most of your current situation, keep you informed of future opportunities and develop innovative financial strategies directed towards enhancing your life and the lives of your family.

"Financial advice is more than just managing people's money to us," says Josh, a former Corporate Accountant and

University of Western Sydney Commerce graduate. "We offer our clients stability and support. It's a matter of trust, a rapport we build with our clients that we take very seriously. We want to safe-guard them against wrong moves financially, guide them through the tough times and plan for a secure future."

## Clients

With a client base that extends all over Australia yet with a strong local focus Lewis Financial Advisory Group are deeply committed to providing lawful and ethical financial advice.

Unsolicited testimonials on the company website talk of trust, caring and expertise; three key values fostered by the staff at Lewis Financial. "The testimonials underline the unique client driven nature of our business as compared to other financial planning companies," says Max. "In these uncertain times people need someone they can trust. At Lewis Financial we realise that the opportunity of managing people's financial affairs places us in a privileged position, one which we are mindful of at all times," says Max.

For more information phone 4739 6699, email [info@lewisfinancial.com.au](mailto:info@lewisfinancial.com.au) or go to [www.lewis.hillross.com.au](http://www.lewis.hillross.com.au) \*