Lewis Financial

Enhancing lives through professional financial advice


Lewis
Financial
Ph 4751 4300

Lewis Financial Advisory Group is a family business that has been providing professional advisory services since 1985.

We are passionate about making a positive difference to the lives of our clients and their families and developing long-term personal relationships.

We provide long-term strategic advice and planning. Our private clients also trust us to manage over $200 million in investment assets.

Financial leadership
We can provide you with knowledge, guidance and information so you can make informed decisions and be comfortable with them.

Building confidence
We understand that the financial world can be both complex and intimidating. We can provide:

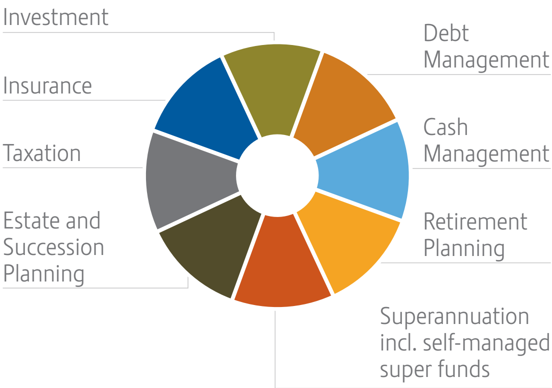
- clarity — to simplify the management and protection of your wealth;
- peace of mind — that you are making the most of your current situation; and
- confidence — that future opportunities have been identified and that you are positioned to take advantage of them.

Shared values
The clients we choose to partner with are those who share our values of integrity, honesty and respect and who want to enhance their lives, and the lives of their families, through lawful and ethical financial advice.

True professionalism
Our clients see us as true professionals and we are committed to putting your interests first. We provide a personalised service based on mutual trust and the development of long-term relationships.

Security
Lewis Financial Advisory Group has been providing financial advice and developing innovative financial strategies since 1985. We can help you make some of the important decisions necessary to set you on a course of lifetime financial peace of mind for you, your family and others dear to you.

Our services



The financial planning process

1. Together we identify what you are hoping to achieve from our advice.
2. We gather all relevant information from you and analyse your financial status.
3. We develop financial strategies aimed at achieving your goals.
4. We present our advice to you and explain the reasons behind it.
5. We implement the advice with which you choose to proceed.
6. Together we review and revise the advice on an ongoing basis.

How we are paid

Our preferred method of payment is a flat dollar fee, agreed upon with you, determined by the nature and scope of the advice and services you need.

We will list the services we plan to provide you and how we will charge for them before asking you to commit to paying anything.

We will detail our proposed costs in writing and these will be subject to your agreement. You will not pay more than the amount we quote irrespective of the time we expend to complete your matter.

Lewis Financial charges no additional fees, whether establishment, placement, or any other fees, beyond those we quote for advice preparation.

For any ongoing strategic reviews, investment portfolio management or other consultancy, we will agree on a fixed dollar service fee with you.

The Lewis Financial family

Our principal advisor

Joshua Lewis (Director/Financial Advisor) has worked in financial services since 2003. Prior to becoming a Financial Advisor, Josh worked for six years as a corporate accountant. He holds a Master of Financial Planning (with Distinction), is a Certified Financial Planner® professional and a SMSF Specialist Advisor™.

Josh also holds a Bachelor of Commerce, a Diploma of Financial Services (Financial Planning) and an Advanced Diploma of Financial Services (Financial Planning).

Josh has extensive knowledge of superannuation, retirement planning, risk management and wealth accumulation strategies. He is a member of the Financial Planning Association of Australia (FPA) and the Self Managed Super Fund Association (SMSF Association).

Joshua Lewis is an Authorised Representative (AR No 292346) of Lewis Financial Services Licence Pty Ltd (AFS Licence No 522904).

Our founder

Max Lewis (Consultant) has been involved in financial services since 1985 when he left the legal profession. Max is highly regarded for his technical knowledge in superannuation and retirement planning.

Max received industry-wide recognition in 2004 when he successfully brought about amendments to Retirement Income Stream Legislation through representations to Federal Treasury.

Max holds a Diploma of Financial Planning and an Advanced Diploma of Financial Services (Financial Planning).

Max has far-reaching experience with superannuation, Centrelink regulations, insurance products, managed investments and shares.

Our client services team

Combined, our team of client service managers has over 50 years of experience in financial services and have backgrounds ranging from accounting to the legal profession. The team draws on both practical experience and academic qualifications to bring you a unique, highly personal and professional service.

Our relationships

Lewis Financial Advisory Group Pty Ltd is a Corporate Authorised Representative (AR No 253116) of Lewis Financial Services Licence Pty Ltd.

Both Lewis Financial Advisory Group Pty Ltd and Lewis Financial Services Licence Pty Ltd are wholly owned companies within the Lewis Financial group of companies.

Lewis Financial Services Licence Pty Ltd holds an Australian Financial Services Licence (AFS Licence No 522904).

Testimonials

'Thank you so much for your time, patience and effort that you put into preparing and presenting our Statement of Advice. It is exactly what we need to help us make informed decisions about our future.'

'Your meticulous and thoroughly professional approach instilled confidence in us and gave us an insight into the importance of careful planning. We really appreciated your generosity in sharing your expertise and are grateful that Lewis Financial will be available to guide us in the future.'

'I wanted to express my appreciation for your efforts in successfully resolving the issues involved with my parents' retirement. Their retirement presented many problems that you approached in a very professional and compassionate manner. Your very thorough analysis and working of the problem and your obvious concern to succeed in achieving the right and appropriate result provided great reassurance and comfort to both them and myself.'

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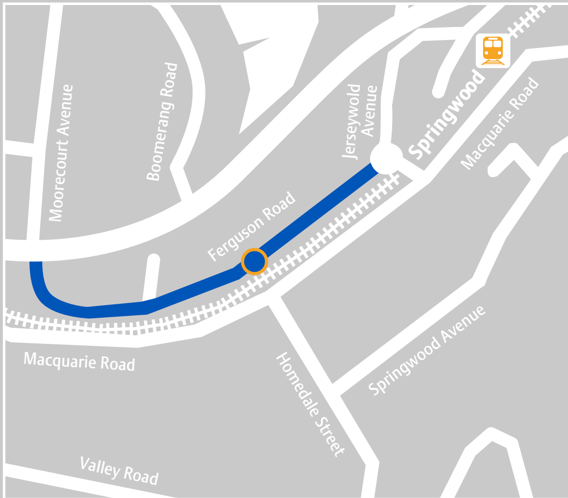

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