## Our partnership with Hillross

To ensure we provide our clients with the best advice, we have partnered with Hillross, a leading professional wealth management firm.

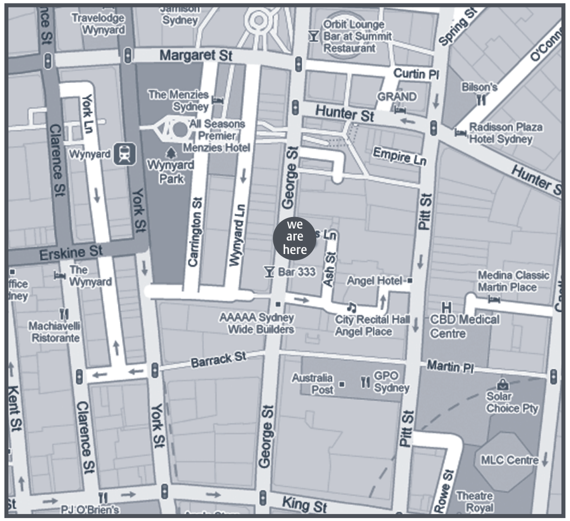
Hillross was established in 1987 and today looks after more than $10 billion in client funds.

With more than 300 financial advisers across Australia and the backing of AMP, one of the best-known financial firms in Australia for over 160 years, Hillross reflects what we are all about - professional wealth management with solid foundations.

> So-ci-us (sō'-shē- s) the Latin word for, a partner, associate, ally.

HILLROSS Professional Wealth Management

SOCIUS WEALTH MANAGEMENT




### For personal service with a difference please contact us:

Level 3, Suite 1
350 George Street
Sydney NSW 2000
**P** 02 8223 2600
**F** 02 9221 6177
**E** info@sociuswealth.com.au
**W** www.socius.hillross.com.au

Socius Wealth Management Pty Ltd is an Authorised Representative of Hillross Financial Services Ltd ABN 77 003 323 055, AFSL No. 232705.

The information contained in this brochure is of a general nature only. No account has been taken of the investment objectives, financial situation or particular needs of any particular person. Before making any investment decision, individuals will need to consider (with or without the assistance of a financial planner) their own particular needs, objectives and circumstances to avoid the risk of making an inappropriate investment decision.

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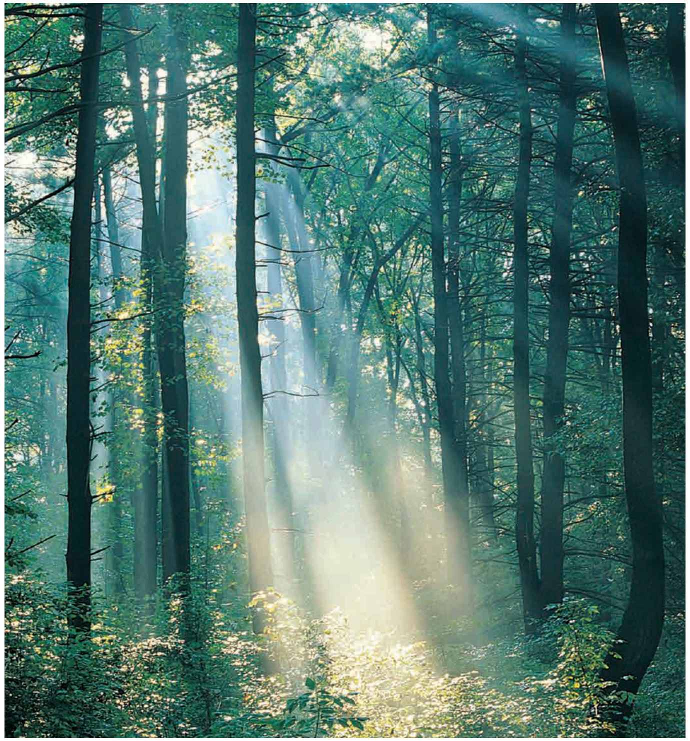
# About Socius Wealth Management



## About Socius Wealth Management

Socius Wealth Management is a boutique financial advisory firm that delivers tailored financial strategies to help its clients meet their lifestyle and financial goals.

## Socius's professional team work with you to achieve your objectives

At Socius, we recognise that the quality and experience of our team is the key to our success, and more importantly, your financial well-being. Our team of financial advisers pride themselves on their professionalism and client-centric focus, and will work with you to help create a life of choice and opportunity.

We can provide strategic advice and innovative solutions that meet your needs in a range of areas including:

- Self-Managed Superannuation Funds
- Relationship breakdown and divorce
- Retirement & Investment planning
- Superannuation strategies
- Redundancy advice
- Salary packaging
- Direct Shares
- Personal insurance and risk management
- Estate and Succession planning
- Budgeting and debt management
- Centrelink benefits
- Portfolio construction and review.

"Over 50 years collective experience in helping our clients achieve their goals"

## At your service

### John D'Alessandri CFP® BBus FFPA FCPA DipFP

John has over 23 years experience as a financial adviser, advising a broad range of clients including senior executives. Prior to establishing Socius Wealth Management, John held several senior management positions within a major national financial planning group.

### Ros Johannesen CFP® BBus DipFP

Ros has over 15 years experience as a financial adviser, advising a broad range of clients including senior executives. Prior to establishing Socius Wealth Management, Ros held various senior positions with a major financial planning firm, a management consulting group and a leading career management firm.

### Penny Chai CFP® CPA BEC DIP FP DIPSM

Penny has over 12 years experience as a financial adviser, advising a broad range of clients from age pensioners to senior executives. Prior to joining Socius Wealth Management, Penny practised as a senior financial planner for a leading financial planning group.

"...the quality and experience of our team is the key to our success, and more importantly, your financial well-being..."

## Investment Committee

Included in our team, we have our own Investment Committee, who apply their technical and analytical skills to review and select investments, to find the best options for our clients.

Our Investment Committee's philosophy is to assist our clients to maximise their wealth while adhering to three key principles:

- Minimising risk
- Optimising returns
- Minimising fees and taxes.

The committee provides a number of solutions, including managed fund portfolios, limited direct share portfolios and investment strategies for managed and self-managed superannuation funds. Research is gathered from various sources including managed fund research providers, direct share research providers and the fund managers themselves to support the analysis and decision making. A short list is then produced, in conjunction with Hillross, of the investments that the committee believes are suitable for our clients.

## Our focus

We are committed to providing clients with professional, ongoing, quality service, advice and lifestyle improvement.

We manage and administer individual investment portfolios according to individual client risk tolerance references and direction.

We deliver a caring and personal service to protect and grow our clients' wealth by utilising some of the best investment opportunities available.