



Testimonials

Glenda

Over the years I have used and worked with many Financial Planning Companies. Unfortunately, most of them have given me the impression that they are not in business for the right reasons.

My personal and financial position has changed dramatically over the past 4 years so I needed solid financial advice to help sort out my options. A trusted friend recommended John D'Alessandri and his team at Socius Wealth with glowing comments.

Right from the very beginning, I have felt that John is very genuine, warm and most determined to offer me the best possible solution for my investments and overall financial plan. John explored all options and explained them in full while ensuring that I am comfortable and understood his advice. John is prompt with responding to my phone calls and emails, this goes true with my dealings with the staff at Socius Wealth who have also been exceptional.

Thanks to John, I now have a good superannuation portfolio and I am confident about my future financial wellbeing. This could have been a totally different result had I not gone with my trusted friend's recommendation to speak to John D'Alessandri at Socius Wealth. I highly recommend you talk to them too for peace of mind about your financial future.



WHAT'S YOUR
IDEA OF
FINANCIAL
FREEDOM?



Hector

Having used Socius Wealth Management has certainly been a positive experience over the past 10 years.

I began mainly with a property portfolio which I believed to be adequate for my medium to long term financial needs and I assumed I had fair knowledge of money matters. All that changed after my association with Socius.

Suddenly I became more involved with Investments, Superannuation funds, estate planning, tax minimisation and a whole new financial perspective has opened up for me.

Over a period of years my financial position had changed dramatically. My overall wealth had grown but it had been done so methodically and efficiently and suddenly my aim of retirement had become a reality.

I could now plan to retire with a tax effective income stream and maintain a quality lifestyle indefinitely. Not only that, but until I retire I use the tax minimisation and Super contributions to grow my wealth instead of simply paying tax and with financial advice I have been diverting income into these various channels depending on the economic situation at the time. Even the Investment and tax advice. I have been getting is way above the level an ordinary person can hope to stay attuned to.

I have now been involved at a financial level where you must have experts involved and the rewards come because of it.

Socius has taught me about risk management and return and planning for short medium and long term investment. Property alone was just not going to enable me to achieve my long term goals. I now regret not having started earlier with diversification into all these fields and it really needs to be done by experts. I am not interested in short term gambling with stock Markets.

Having now reached a comfortable level with my portfolio. I trust Socius to manage my income stream according to our personal and family situation and I need this flexibility and financial management for quite a few years yet.

The other task of high importance is also the estate planning. Having created a portfolio over a lifetime I need financial advice on how to make sure it gets parted to the right people after my death as per my desires.

This matter is not to be taken lightly and again I need Socius for advice and planning for this critical time as well.

Socius have been able to provide management and advice over a large portion of my adult life and I can envisage a continuation with them beyond my grave.



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Kate

My name is Kate and it is a true honour to write a testimonial for John D'Alessandri. I am the mother of two 11 year old boys and earlier this year my husband Scott died of Cancer. Three years ago my parents did me the best favour in the world, they introduced Scott and I to John D'Alessandri.

John spent a lot of time in the earlier days, getting to know Scott and I and our wishes for the future for the boys and myself. He assisted us in setting up a substantial superannuation fund, advised us on taking advantage of the opportunity to input larger amounts when that was possible. He also took us through the benefits of a nominated death clause and was very focused on protecting our financial position as much as possible.

Much of the time John attended meetings at our home on the Northern Beaches, this assisted us greatly, especially in the latter part of Scott's illness. John also advised us to move the super into a pension fund, ensuring that after my husband's death, I had a tax efficient income into the future.

When it came time to re-finance my home, John also assisted with this, introducing me to a mortgage broker and advising me on all the ins and outs of name changes and the ramifications of any decisions I might be taking

I know this testimonial should purely be on the services and standard of John's work and in the most part it is. I think it should be noted though, that John had to undertake his role in an often fragile and tragic environment. He had to sit and talk to a family about how to plan for when one member of that family is no longer there. Scott was also not the easiest man to talk to about his finances, he did not like to relinquish control and he questioned everything. John managed this situation in not just the most professional manner but in a steady and calm fashion, with empathy, compassion and honesty.

I have had the biggest financial learning curve of my life. Embarrassingly I was one of those wives that simply let their husband deal with everything financial. I have learnt my lesson and will not do that again. I have also had John at the end of the phone whenever I had another question, another problem or simply needed him to explain it "just one more time".

Any well-trained individual can offer financial services in a professional manner. It takes a special person to manage to do this and do it well in an environment that was as emotionally charged as mine. We are still uncovering things that my husband did not feel the need to tell us and John continues to answer my questions and guide me.



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David

The overriding and essential ingredient to a relationship with a Financial Advisor and Planner is trust. It is the ingredient I put before all else.

My name is David and I first met John D'Alessandri in 2006 on the recommendation of a friend. I just spent a considerable sum of money seeking financial advice from another planner. To cut a long story short, I was not altogether happy with the advice, or the fee structure from this particular planner. John on the other hand gave my wife and I considerable comfort that we were in solid hands with FMD (now Socius Wealth Management).

John advised us on commencing a self managed Superannuation Fund. He took us carefully through the new Government Legislation and Rules and assisted us to ensure that we tax minimised our investments. We meet with him on a regular basis and when we find it difficult or inconvenient to have a face to face meeting in the city, John will arrange the meeting at our home.

Like most busy executives, I could have managed our financial affairs better and spent more time ensuring our investments and the tax paid on our investments was optimised. I can say with certainty, that our financial affairs have never been in better shape. John has listened carefully to our financial objectives and has ensured that as we approach full retirement, our investments reflect a minimum risk profile. He has also ensured that our investment structure allows for maximum flexibility and he has shown himself to be very conscious that our overall investment costs are kept low.

John has used a stepped approach as issues arise. As an example we are now focused on estate planning with a goal of ensuring that our loved ones can inherit our assets without fuss. We have instructed our daughters that if anything was to happen to us, that John would step in and ensure that they would be well served from a planning perspective.

On a personal note, John is one of nature's gentlemen. He is a great family man, a formidable financial planner and most of all; he is a man you can trust.

I am delighted to provide this testimonial for John and his terrific team at Socius Wealth Management.

These clients have agreed to share their story. Everyone's situation is different, so their choices and outcomes will be different to yours. Consider your circumstances before deciding what's right for you.

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