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 $15 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.

SOCIUS: LATIN NOUN
PARTNER, COMPANION, ALLY

OUR INVESTMENT COMMITTEE

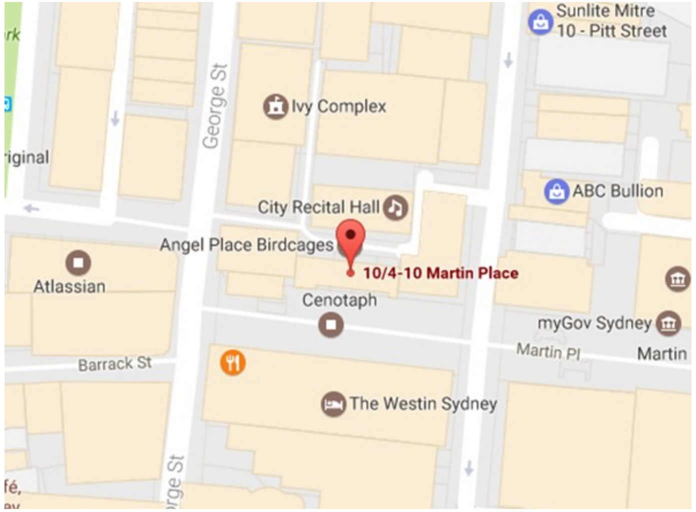
Included in our team, we have our own Investment Committee, who apply their technical and analytical skills to review and select investments, to find the best options for our clients.

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.



SO TELL US, WHAT'S YOUR IDEA OF FINANCIAL FREEDOM?

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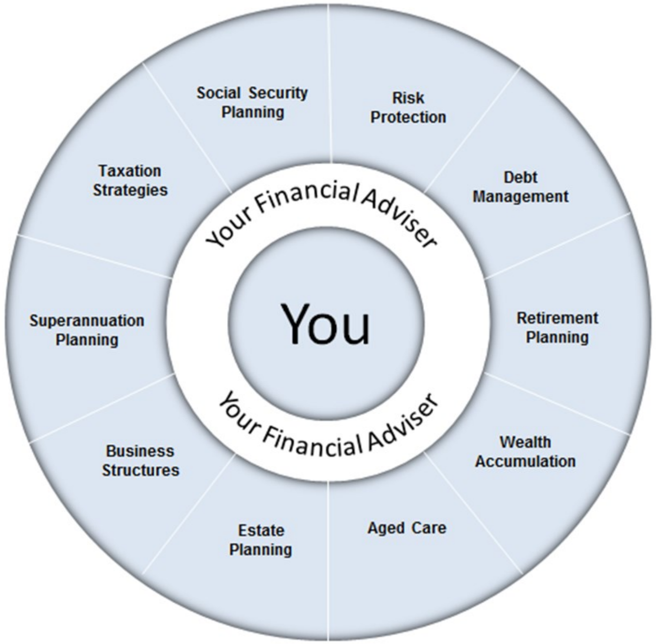
BRINGING FINANCIAL FREEDOM TO LIFE

HILLROSS

ABOUT SOCIUS WEALTH MANAGEMENT

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

We help our clients make financial choices that matter.



OUR FOCUS

We are committed to providing clients with professional, on-going, 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.

YOUR PROFESSIONAL TEAM

John D'Alessandri
Director /
Financial Advisor

John D'Alessandri CFP® BBus FFPA FCPA DipFP

John has extensive 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
Director/
Financial Advisor

Ros Johannesen CFP® BBus DipFP

Ros has extensive 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
Financial Advisor/
Practice Manager

Penny Chai CFP® CPA BEc Dip FP DipSM

Penny is an experienced financial adviser, advising a broad range of clients from age pensioners to senior executives. Prior to joining Socius Wealth Management, Penny practiced as a senior financial planner for a leading financial planning group.

Que Di-Leo
Financial Advisor

Que Di-Leo CFP® GDip FP BEHons/BCom

Que has over 10 years' experience in the financial industry, as a para planner, associate and advisor with exposure to a broad range of clients from age pensioners to senior executives.

EXPERIENCE THE DIFFERENCE

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
- Portfolio construction and review
- Relationship breakdown and divorce
- Retirement & Investment planning
- Superannuation strategies
- Redundancy advice
- Direct Shares
- Personal insurance and risk management
- Estate and Succession planning
- Budgeting and debt management