

Fiduciary Services

Lotus Fiduciary Services provides daily money management and fiduciary services to a wide range of individuals including minor children, at-risk adults, affluent families and busy professionals. Our commitment is to treat each client as a member of the Lotus family by providing responsive and personalized service.

- Daily Money Management
- Financial Power of Attorney
- Personal Representative
- Private Trust Manager
- Conservator

Other services:

- Organization of mail, paperwork and tax information
- Budgeting and cash flow management
- Inventorying of assets and investments
- Bill paying and bookkeeping
- Personal property management
- Customized services as requested



Let Lotus handle your day-to-day financial affairs so you don't have to.

Lotus Fiduciary Group

Lotus Fiduciary Group is dedicated to providing education and advocacy in the area of fiduciary management and support services. Our mission is to provide responsive and efficient fiduciary and daily money management services while supporting families and other professionals as they fulfill their duties and responsibilities.

Feel the Lotus Difference
Our Core Values

Trust • Honor • Respect

- Our employees must pass extensive testing, credit and background checks.
- We donate a percent of our profit each year to charitable organizations.
- We volunteer our time and energy to educate others on best practices in daily money management and fiduciary services.
- Our goal is to ensure our client's priorities and values are protected by encouraging autonomy and independence.

Our Brand Promise:

To embrace our core values in every decision we make
To support our clients and their families
To advocate for each client's individual goals
To improve and promote the fiduciary industry through educational training and support



Fiduciary Support Services

Lotus Fiduciary Support Services is dedicated to providing education and support to families and other professionals who need assistance fulfilling their fiduciary role and responsibilities.

- Fiduciary consulting and coaching in a group or one-on-one setting
- Preparation and adjustment of accountings
- Independent review of accounting reports
- Neutral "tie-breaker" services for co-agents
- Firearms and personal property management
- Third party witness for inventorying personal property
- Conference room rental for neutral meeting space
- Track income and expenses for accountings and tax preparation
- Prepare an inventory, budget and financial plan
- Mentoring and fiduciary oversight
- Customized services as requested



Where education and advocacy meet passion and purpose

Why The Lotus?

In many cultures, the lotus flower is associated with prosperity, purity, spiritual awakening and faithfulness. Each morning, it emerges from the mud and murky water to bloom into a beautiful and fragrant flower. As it rises from below, the drops of water easily slide off each petal and the lotus detaches from the old into the possibility of a new beginning.

For us, the lotus represents the unique journey we all experience in life and that, through love and compassion, all things are possible. Many of our clients come to us facing difficult circumstances; our mission is to make a noticeable change that improves their day-to-day financial affairs and, by extension, their personal lives. The lotus is a constant reminder that, despite how messy and chaotic our lives may seem, we have the strength and hope to rise above what may seem impossible into a place a love and light.

And so it is...

TRUST • HONOR • RESPECT



As the great Chinese Philosopher
Confucius once said

*"I have a love for the Lotus, while growing
in mud it still remains unstained."*



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Professional Disclaimer:

Lotus Fiduciary Group, LLC and all Lotus affiliate companies including Lotus Fiduciary Services and Lotus Fiduciary Support Services are not: a chartered trust company, bank or a corporate trustee. We are not insurance agents, CPA's, financial advisors or licensed Attorney's and do not provide legal advice.



LOTUS
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TRUST • HONOR • RESPECT

