



7 Reasons to Work with Lotus Fiduciary Group, Inc.

1. Experience

We have been in business for over 16 years and have provided services to hundreds of people across the United States.

2. We are insured and bonded

Third-party Employee Dishonesty Bond Errors & Omissions Insurance
General Liability Insurance Cyber Fraud Insurance

2. We have professionally trained and certified staff

Certified Professional Daily Money Manager and a National Certified Guardian
We attend continuing education every year and have staff training on a monthly basis
We have a full-time case manager and property manager on staff

3. Our codes of ethics

We abide by 2 different sets of Codes of Ethics and Standards of Practice

4. We take security and confidentiality seriously

We use the latest technology and security measures to ensure that your information and assets are protected by storing our clients data on Servers that are actively managed and monitored as opposed to using Cloud services.

Our office is located in a secure building with on-site security personnel

5. We believe in accountability and transparency

We send copies of financial reports and accountings to our clients and their families on a monthly and annual basis.

We use industry specific software which allows us to store, track and manage client data and related tasks to ensure proper execution and follow up.

6. We are committed to providing the best service possible

We have a proven track record of providing reliable and trust worthy service.

See our list of testimonials from past and present clients, their families and other professionals who have referred their clients to us.

7. We perform pre-employment testing on all employees

We hire an outside HR company to perform credit checks, background checks, pre-employment testing and check references.

For more information: www.lotusfiduciarygroup.com