



A D V I S O R S

WEALTH MANAGEMENT

PRIVATE DEALS

OUR CLIENTELE

BLOG

LOG IN

MAKE LIFE COUNT



Break Away From Vanilla Solutions



You've
Worked Hard
to Earn
Success
(Touch to Flip
Box)

...
Know...



The
Traditional
Playbook
Doesn't Fit
(Touch to Flip
Box)



You Deserve
More From
Your Advisor
(Touch to Flip
Box)

...
mediocritiy we
involve you to
lessen more
about our firm.

(For business owners and professionals with at least \$500,000, and
retirees with at least \$1 million).

Wealth Management, Rebuilt

LotusGroup was founded by management consultants who spent countless hours listening to clients. We have constantly questioned whether industry best practices are truly best. (Hint: they usually aren't for high achievers)

Learn how behaviors should be matched to investment decisions. See how private investments should be added to public strategies. Join a growing community that is flat-out winning.

Behavioral Assessments

Ever wonder why there are so few winners in the markets?

The key factor isn't risk tolerance, it's selecting a strategy you will actually stick to.

Rather than promoting the idea du jour, we match investment strategies to client behaviors using proprietary assessments.

Whether the match is to a comparison-based strategy, an absolute-based one, or an income-producing private approach...a good match means reduced stress and higher returns.

DISC

Risk

Strategy Liquidity

Private Investments

Problem: Your Advisor focuses on public markets with no real ability to find quality private investments.

Solution: LotusGroup professionally sources opportunities, and negotiates lower investment minimums so that clients can access deals alongside the uber rich.

Result: Our approach is conflict free, and delivers consistent income with higher long-term returns.

Handcrafted Service

Tired of companies that pay lip service to “putting the client first?” Often it’s just a marketing message with very little follow through.

At LotusGroup, we consistently deliver on the basics, while asking about and then communicating in a style that you prefer. Furthermore, our culture is laser-focused on empowering clients to make decisions and then to take care of the execution details.



See How Our Clients Are Thriving Today



OWNERS



PROFESSIONALS



RETIREES



DENTISTS

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We serve clients
Nationwide and are
registered at the SEC
level, as well as in
California, Colorado,
New York and Texas.

LotusGroup Capital
LLC and its affiliates
are Licensed with
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