



**LOWE
LIPPMANN
TRAKMAN**
FINANCIAL SERVICES

WE ARE COMMITTED TO EMPOWERING AND HELPING YOU TO MAKE SMART DECISIONS WITH YOUR MONEY.
BY CHALLENGING YOUR TODAY WE WILL REDEFINE YOUR FUTURE.



ALEX DU PLESSIS

BSc, B.Com, Grad Dip FP, MAppFin, CFP®

FINANCIAL ADVISER

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ALEX, A CERTIFIED FINANCIAL PLANNER® PROFESSIONAL, HAS BEEN IN THE FINANCIAL SERVICES INDUSTRY SINCE 2004 AND IS A DIRECTOR OF LOWE LIPPMANN TRAKMAN FINANCIAL SERVICES. HE HAS A MASTERS IN APPLIED FINANCE & INVESTMENT AND IS A SPECIALIST IN SELF MANAGED SUPER FUNDS AND INVESTMENTS.

PROFILE

Alex gained extensive experience whilst working in some of Melbourne's largest independent financial planning firms and joined Grauman & Trakman Financial Planning in 2011. In 2013 Grauman & Trakman merged with Lowe Lippmann Trakman Financial Services where Alex is a Financial Adviser and Director.

Alex helps to clear the confusion of the seemingly endless rules and regulations of the ever changing super landscape. He helps clients achieve their financial objectives and lifestyle goals and enjoys seeing clients gain the confidence to make informed decisions so they can get on with enjoying the things that matter most to them. Alex helps people to plan for retirement and to manage life transitions (such as loss of

employment). In particular, Alex has a special interest in guiding people along the road to long-term financial success.

EXPERTISE

Alex specialises in:

- Investment Planning;
- Retirement Planning;
- Superannuation Strategies;
- Wealth Creation & Tax Effective Strategies;
- Financial Modelling;
- Personal Insurance;
- Partnership Buy/Sell Strategies; and
- Key Person Insurance.

QUALIFICATIONS

Alex has a Bachelor of Science (Physiology) degree, a Bachelor of Commerce (Accounting) degree, a Graduate Diploma in Financial Planning and a Masters in Applied Finance & Investment.

He is also a CFP practitioner member of the Financial Planning Association.

PERSONAL

Alex is an avid sportsman. He has won 3 national Ultimate Frisbee championships and a silver medal whilst representing Australia at the world championships in Japan in 2012.

Alex has also played many years of basketball and won a Victorian Head of the River as a coxswain. He now plays pennant squash and loses to people 30 years his senior on a regular basis!