



VESTEX

WEALTH MANAGEMENT

Vestex Wealth Management

Central House,
101 Moray Street,
South Melbourne,
VIC, 3205



ABOUT US



VESTEX WEALTH MANAGEMENT

We aim to provide a tailored financial strategy to bridge the gap between where you are and where you want to be.

Vestex Wealth Management is here to help nurture, grow and protect your wealth. Our goal is to help you meet your investment needs and enable you to build your wealth with confidence.

We believe in challenging the status quo, in thinking outside the box to achieve the desired outcome. We do this with a deep desire to help you reach your full potential using the resources at our disposal.

HOW CAN WE HELP YOU?



When choosing a wealth manager, you need to be confident they will support you. We believe in collaboration, commitment, care and community – values that are embedded in our culture and values reflected in every interaction with our clients.

Whether you are building wealth, preparing for retirement, or preserving your wealth, our role is to provide clarity, structure and guidance throughout.

Wealth management is about more than just investments. It involves understanding your position, defining your goals, and putting a structured strategy in place.

Our investment philosophy is built on structure, diversification and a long-term perspective. Markets move through cycles, and periods of volatility are inevitable. Our focus is on maintaining discipline and ensuring your portfolios remain aligned with your objectives, risk tolerance and investment time horizon.



OUR NETWORK



The world of wealth may seem very daunting at the beginning. To make things easier, we've established an effective ecosystem of external financial professionals supporting you throughout your financial journey. With Vestex Wealth Management in your corner, you'll have access to our team of professionals through one point of contact, your project manager.





WORKING WITH US

Wealth Accumulation & Investment Planning

Long-term investment strategies across superannuation and non-superannuation environments.

Cashflow Management & Budgeting

Improving financial organisation and surplus allocation.

Superannuation Advice & Management

Superannuation structuring, contribution strategies, and ongoing oversight.

Pre-Retirement & Retirement Planning

Structuring finances to support retirement transition and sustainable income.

Family & Asset Protection

Protecting wealth and those important to you.

Estate Planning

Coordinating structures and beneficiary arrangements for generational planning.

Commitment underpins what we do - if we're asking for it from you, you're getting it from Vestex.

We believe wealth management is a long-term process. It requires clarity, discipline, and a shared understanding of the objectives we are working toward.

Our role is to provide structure and strategic direction. Through ongoing reviews and proactive advice, we ensure your strategy remains aligned as your circumstances evolve.

The relationship does not end after implementation. Ongoing oversight, refinement, and accountability form a core part of how we operate.

THE VESTEX PROCESS

Everyone's financial journey is different and we aim to understand your journey and provide you with tailored wealth management advice no matter where you are on your financial journey.

When you first come on board as a client, our team will spend time getting to know you and your circumstances.

We will learn about your financial and lifestyle goals and work with you to ensure you have the best wealth management expertise to help you achieve those goals.

Our team will build an enduring relationship with you and, if your circumstances change, adapt and advise you on the most appropriate outcomes.

Vestex Wealth Management will be with you every step of the way with careful planning, strategy execution and regular reviews.



Discovery meeting



Research



Strategy outline



Strategy meeting



Creating your roadmap



Implementation



Ongoing management and review

Let's start the journey.



Portfolio
Management



Super
Management



Debt
Management



Tax
Optimization



Estate
Planning



Personal
Insurance

Upfront Fees

From \$3,300

Single

From \$4,400

Couple

Ongoing Fees

Flat Fee; plus

Account Managed

Percentage

2,200 p.a +

Superannuation, SMSF,
IDPS, Bond account

1.1% p.a

Annual Strategic Review

A structured review of your strategy, goals and overall financial position

Bi-Annual Portfolio Review

Ongoing portfolio oversight to ensure alignment with your objectives

Access To Adviser

Ongoing access to discuss your plan and objectives as they evolve


Administrative Support

Account maintenance, implementation support and ongoing service assistance



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Eroll Lumani is an Authorised Representative (No. 001262443) of
Spark Advisors Australia ABN 34 122 486 935 & AFSL 380552

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