



MARINIS
FINANCIAL GROUP

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Adelaide-Based Financial Advice Powerhouse Created

Adelaide based Caveo Partners and Marinis Financial Group today announced they had merged, creating a locally owned and managed financial services business providing Financial Planning, Accounting, Finance and Legal advice employing more than 70 people and advising over 2000 clients.

Managing Director Stefan Lipkiewicz said the addition of the Marinis team bolstered the group's financial planning advice business and their capabilities, which now looks after the financial and retirement plans for more than 1000 families.

'Both firms have deep roots within our community. We are known for doing what we say we will and for recognising we only succeed when our clients do.'

'The merger is all about enhancing our strength and capability and importantly continuously improving the breadth and quality of advice and service we provide our clients.'

'Marinis Financial adds to our already excellent team of advice specialists providing additional expertise in superannuation and wealth management. Caveo Partners is and will remain focused on longer-term needs and on assisting clients optimise their businesses or family's financial well-being,' Stefan said. Chris Klimatsakis, Director of Operations and Financial Planning at Caveo Partners, said the merger would be seamless for clients and that the larger Group would benefit from cross-learning and strong financial management.

'We are delighted by the shared values between the two entities. We also recognise the larger Group will provide terrific career opportunities for the bright young talent which are now working under the same roof at Halifax Street,' Chris said.

Theo Marinis will continue in his role as Responsible Manager of Marinis Financial Group, which retains its own Financial Services Licence, and will in addition have responsibilities as Chief Economist for Caveo Partners and will join the Caveo Partners board and leadership team.

'I could not have found a better partner to merge with,' Theo said. 'I have known Stefan and Chris for decades. We share a sense of responsibility for our clients – and a drive to add value at all stages of the financial life cycle. Importantly our clients will have access to a range of in-house accounting, tax, finance and legal expertise all available in one integrated team.'

Marinis Financial Group will operate from Caveo Partners Adelaide head office going forward.

If I, or any of our team can be of assistance, please don't hesitate to get in touch by either calling (08) 8130 5130 or email admin@marinigroup.com.au

Yours sincerely

Theo Marinis CFP®, B.A., B.Ec., CPA., MCIFAA
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