



Frequently Asked Questions

1. What types of services do you provide?

We provide fiduciary services such as Daily Money Management, Conservatorship, Power of Attorney, Personal Representative, Trust Administration and Support Services.

2. Who are some of the kinds of people that may need the services provided by Lotus Fiduciary Group, Inc.?

We specialize in working with seniors, persons with disabilities, corporate executives, affluent families and people who travel. Managing one's personal finances can become difficult due to the affects of aging, having a disability, extensive traveling, or any other number of reasons. We can provide custom plans that allow the client more freedom to handle the aspects of their finances that they wish to, while we take care of the rest.

3. Are you a corporate trustee, CPA, Attorney or Licensed Insurance Agent?

No. All Lotus affiliate companies are private companies and not to be construed to be chartered trust companies, corporate trustees, banks, insurance agencies, CPA's, financial advisors or licensed attorneys.

4. How do you charge for your services?

We charge for our time. We have variable hourly rates which we charge depending on the staff member and type of task being performed. To request a fee schedule, please contact our office.

5. What if I don't need your services now but I need someone to nominate as my fiduciary in my estate plan?

Lotus can be named as the fiduciary in your Will, Trust or Financial Power of Attorney. We can provide a free initial consultation to discuss and review your current and future needs to ensure we are the best fit for your plan. We call this service our pre-need planning services which allows you to choose your fiduciary in advance of a crisis so that you have peace of mind knowing what will happen to you and your estate in the event of your death or disability. Please contact our office for more details.

6. What areas of Colorado do you serve?

We are currently located in Cherry Creek and serve Denver and the surrounding metropolitan areas. We will serve clients in other states however those services are arranged on a case by case basis.