Apt.
WEALTH PARTNERS

Your Retirement

Enjoy a life that's not so retiring after all

Retirement should be everything you hope for. A time to enjoy life on your own terms, backed by the peace of the mind that financial security brings.

Now it's all about you

Retirement looks different for everyone. For some it is a point in time when work stops, and a new phase of life begins, for others it can be gradual phase out of work. Whatever your circumstances, our goal is to make it simple with financial advice that lets you maximise the opportunities of this exciting life stage.

Stay in control of your finances

Plan your cash flow

Invest redundancy payments in a tax-effective way

Explore and access hardship assistance

Make decisions for today and your future

Stay on track with your financial goals

Apt Wealth Partners (AFSL 436121) ABN 49 159 583 847

1800 801 277 | aptwealth.com.au | @aptwealth.com.au

Sydney | Melbourne | Geelong | Northern Beaches

PLANNING YOUR RETIREMENT STARTS WITH CHOOSING THE RIGHT PARTNER

How we work with you

DISCOVERY
We want to get to know you, understand your personal situation, goals and objectives.

DESIGN
We design a financial strategy with a mix of services that match your goals and objectives.

EXECUTE
We manage the plan as your personal CFO. You can get as involved as you like, or just leave it to us.

REVIEW
Our regular reviews ensure we're always on top of inevitable changes that come up.

Retirement is a time to invest in experience

With a skilled team of over 40 professionals, Apt Wealth Partners has been helping Australians achieve their financial goals for over 30 years. We've helped our clients navigate everything from 'the recession we had to have' to the global financial crisis, and we can help you forge a personal path to financial security in retirement.

WE ONLY ANSWER TO YOU

The advice we share reflects our analysis, experience, understanding of your needs, and genuine desire to help you achieve a financially secure retirement.

WE MAKE THE COMPLEX SIMPLE

Our goal is to impress you with results – not confuse you with jargon. You will always understand where your money is invested with Apt, and whenever you have questions, we'll be here to provide answers.

WE INVEST IN YOUR GOALS

Retirement means different things to each of us.

That's why our first step is simply getting to know you. No hard sell. No one-size-fits-all plans.

WE'RE COMMITTED TO YOU

Our track record speaks for itself. We plan to partner with you over the years ahead, fine-tuning your financial plan in response to changes in markets or your lifestyle needs.

PROFESSIONAL PRACTICE
FAAA FINANCIAL ADVICE ASSOCIATION AUSTRALIA