Andrew Dunbar

CFP®, Adv Dip FP, BCom, BEc

Financial advice makes a difference.

Seeking professional advice to help achieve your financial goals is an important investment in your future. We are committed to working with you to help you define your goals and design a financial plan to meet your needs.

Andrew Dunbar has a number of years of experience in Financial Planning. He is highly qualified with degrees in both Commerce and Economics from Monash University.

He holds the Advanced Diploma of Financial Planning and the Certified Financial Planner® professional status with the Financial Advice Association Australia (FAAA).

Andrew has received several awards in the financial services industry for his professionalism and commitment to clients.

Andrew is passionate about helping people. The aim at Apt is to help people achieve "Lifestyle and Financial Success".

As an Authorised Representative of Apt Wealth Partners Pty Ltd (Apt Wealth Partners), Andrew is able to assist clients in the areas of:

- Tax-effective investment strategies
- Superannuation strategies
- Retirement planning
- Centrelink entitlements
- Direct equities
- Life insurance (life, TPD, trauma, income protection, business expenses)
- Estate planning
- Self Managed Superannuation Funds
- Margin Lending
- Salary Packaging

Andrew is committed to building long-term relationships with clients by providing them with appropriate professional advice and personal ongoing service.

On a personal level, Andrew enjoys spending time with family and friends, keeping fit, traveling and following the Carlton Football Club.

Andrew is an employee and is paid a salary. He may be entitled to an annual bonus, if he meets, or exceeds, defined client service, compliance and training standards. As a shareholder and director of Apt, he may also be entitled to dividends based on the financial performance of the group.

This document together with the document titled "Financial Services and Credit Guide Version: 4.1" issued by Apt Wealth Partners on 20 March 2024 form the Financial Services and Credit Guide for advice and services provided by Apt Wealth Partners, AJR Financial Services or Andrew.

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Andrew is an authorised representative of Apt Wealth Partners Pty Ltd ABN 49 159 583 847 AFSL and ACL No. 436121 (Apt Wealth Partners).

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