



Anthony Lee

BBus(Acc), GDipFP

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.

Anthony has around 7 years of experience in the financial services industry.

He holds a Bachelor of Business majoring in Accountancy and a Graduate Diploma of Financial Planning. He has passed the financial adviser exam.

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

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

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

On a personal level, Anthony enjoys keeping active, travelling, and spending time with family and friends.

Anthony 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.

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 Anthony.

Contact Details:

T 03 8779 5254

E anthony@aptwealth.com.au

Level 8, 360 Collins Street

Melbourne VIC 3000

AUTHORISED REPRESENTATIVE NUMBER ISSUED BY THE AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION: 1301158

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

VERSION: 4.1 ISSUE DATE: 20 MARCH 2024

Authorised for distribution by Apt Wealth Partners Pty Ltd
ABN 49 159 583 847 AFSL AND ACL NO. 436121