



Brett Rowe

CFP®, DFP, BBus

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.



Brett has a number of years of experience in the financial services industry, with the majority of this time spent working for a large and mid-sized wealth management firm.

Brett's qualifications include a Bachelor of Business and a Diploma of Financial Planning. Brett is also a Certified Financial Planner® professional with the Financial Advice Association Australia (FAAA).

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

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

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

Brett 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 Brett.



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Brett is an authorised representative of Apt Wealth Partners Pty Ltd
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