David Maddock

CFP®, BCom (FP)

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.

A Geelong local, David holds a Bachelor of Commerce majoring in Financial Planning and Management. Having worked in financial services for a number of years, David is also a Certified Finanical Planner® with the Financial Advice Association Australia (FAAA) and a Self-Managed Super fund Specialist (SSA).

As an experienced senior adviser, his diverse career has included roles as associate adviser, paraplanner and practice manager. As an Authorised Representative of Apt Wealth Partners Pty Ltd (Apt Wealth Partners), David is able to assist clients in the areas of:

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

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

David 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 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 David.

Accredited SMSF Association Specialist

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David is an authorised representative of Apt Wealth Partners Pty Ltd
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