



Elizabeth Wise

BCom, 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.

Elizabeth has around 8 years of experience in Financial Planning which includes working in advice support and client services.

She holds a Bachelor of Commerce and a Graduate Diploma of Financial Planning. She has passed the financial adviser exam.

As an Authorised Representative of Apt Wealth Partners Pty Ltd (Apt Wealth Partners), Elizabeth 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

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

On a personal level, Elizabeth is a long serving member of North Bondi Surf Life Saving Club and enjoys spending time at the club with her friends and family. She competes competitively in surf ski paddling for North Bondi and has represented Australia in Downwind Ocean Racing.

Elizabeth is an employee and is paid a salary. She may be entitled to an annual bonus, if she 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 Elizabeth.

Contact Details:

T 02 8262 4000
E elizabeth@aptwealth.com.au

Level 12, 8 Spring Street
Sydney NSW 2000

AUTHORISED REPRESENTATIVE NUMBER ISSUED BY THE AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION: 1301195

Elizabeth 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