



Emily Lanciana

CFP®, Adv Dip FP, BCom

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.

Emily has a number of years of experience working in financial services.

Emily has completed a Bachelor of Commerce majoring in Financial Planning, Finance and Marketing, and an Advanced Diploma of Financial Services. Emily is also a Certified Financial Planner® with the Financial Advice Association Australia (FAAA).

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

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

Emily 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 Emily.



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