

## ADVISER PROFILE



# Frank D'Alesio

CFP®, BBus(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.



Frank has a number of years of experience in the financial services industry and practising as a financial planner.

Frank's qualifications include a Bachelor of Business in Financial Planning. Frank 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), Frank is able to assist clients in the areas of:

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

Frank is known for the high level of personalised service he delivers and is motivated by providing quality advice that helps people achieve their life goals.

In his personal life, Frank enjoys watching and playing soccer, going to the cinema and discovering new restaurants. He is a passionate car enthusiast and also loves spending time with his family.

Frank 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 Frank.



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Frank is an authorised representative of Apt Wealth Partners Pty Ltd  
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