



Jakob Ayres

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.

Jakob has spent several years working in Financial Planning which includes working in advice support and client services.

He holds a Bachelor of Commerce majoring in Financial Planning and passed the financial adviser exam.

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

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

On a personal level, Jakob enjoys spending time with friends and family, keeping fit and supporting the Richmond Football Club.

Jakob 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 Jakob.

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Jakob is an authorised representative of Apt Wealth Partners Pty Ltd
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