



## James McGregor

*CFP®, Dip FP, BA (Econ), F Fin, FAICD*

### 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.

James McGregor has a number of years of experience in the financial planning profession.

James is a Certified Financial Planner® professional with the Financial Advice Association Australia (FAAA). He is well supported by other academic qualifications including Bachelor of Arts (Economics) and a Diploma of Financial Planning. He is also a Fellow of the Financial Services Institute of Australasia.

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

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

James 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 and managing director 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 James.



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James is an authorised representative of Apt Wealth Partners Pty Ltd  
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