



## Jessica Santiago

*MFinPlan, BBus, DipFP*

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.



Jessica has a number of years of experience in the financial services industry.

She holds a Master of Financial Planning from Griffith University and a Bachelor of Business majoring in Economics and Finance from RMIT University. She has passed the financial adviser exam.

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

Jessica is committed to building long-term relationships with clients by providing them with appropriate professional advice and personal ongoing service. She is passionate about helping people make the complex simple and achieving lifestyle and financial success.

On a personal level, Jessica enjoys travelling, cultural immersion and discovering new food. She prioritises her time between fitness, the great outdoors, and family and friends.

Jessica 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 Jessica.

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Jessica is an authorised representative of Apt Wealth Partners Pty Ltd  
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