

## ADVISER PROFILE



### John Versace

*CFP®, Adv Dip FP, BBus (Ec & Fin), GDipFinServ*

#### 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.



John Versace has a number of years of experience in the financial services industry. John holds a Bachelor of Business (Economics & Finance) and has also completed the Advanced Diploma of Financial Planning.

John 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), John 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

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

John 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 John.



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John is an authorised representative of Apt Wealth Partners Pty Ltd  
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