



## Lisa-Anne Han

*CFP<sup>®</sup>, BBus (Bkg&Fin), MFinPlan*

### 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.



Lisa-Anne has a number of years of experience in the financial planning profession previously working with ANZ and Australian Foundation Investment Company.

Lisa-Anne's qualifications include a Degree in Business and a Master of Financial Planning. Lisa is also a Certified Financial Planner<sup>®</sup> with the Financial Advice Association Australia (FAAA).

As an Authorised Representative of Apt Wealth Partners Pty Ltd (Apt Wealth Partners), Lisa-Anne 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

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

Lisa-Anne 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 Lisa-Anne.



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