

ADVISER PROFILE



Lisa Haley

CFP®, DipFP, AAppSc; GradCertAcc

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 has almost twenty years of experience in the financial services industry, practising as a financial planner.

Lisa's qualifications include a Diploma of Financial Planning, a Bachelor of Applied Science. Lisa is an Accredited Aged Care Professional® and is also a Certified Financial Planner® with the Financial Advice Association Australia (FAAA).

Lisa is currently enjoying completing her Masters of Financial Planning with Deakin University.

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

Lisa is passionate about coaching her clients to achieve financial freedom. She is known for her attention to detail and in-depth understanding of new and changing legislation. Lisa is also an expert in navigating the complex Australian aged care system to help her clients and their families achieve the best possible outcome.

Outside of the finance industry, Lisa enjoys all things health and fitness, a field she worked in prior to qualifying as a financial planner.

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.



Contact Details:

T 03 8779 5254
E lisah@aptwealth.com.au

Level 8, 360 Collins Street
Melbourne VIC 3000

AUTHORISED REPRESENTATIVE NUMBER ISSUED BY THE AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION: 1000764

Lisa is an authorised representative of Apt Wealth Partners Pty Ltd
ABN 49 159 583 847 AFSL and ACL No. 436121 (Apt Wealth Partners).

VERSION: 4.1 ISSUE DATE: 20 MARCH 2024

Authorised for distribution by Apt Wealth Partners Pty Ltd
ABN 49 159 583 847 AFSL AND ACL NO. 436121