



Matthew Dunbar

CFP®, AdvDipFP, BCom

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.

Matthew is a highly qualified financial planner who has a broad range of financial services experience, having previously worked for major banking and accounting firms.

Matthew holds an Advanced Diploma of Financial Planning from Kaplan Professional and a Bachelor of Commerce from Deakin University. Matthew 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), Matthew 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

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

Matthew 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 Matthew.



Contact Details:

T 03 8779 5254

E matthew@aptwealth.com.au

Level 8, 360 Collins Street

Melbourne VIC 3000

AUTHORISED REPRESENTATIVE NUMBER ISSUED BY THE AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION: 1003424

Matthew 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