ADVISER PROFILE

Preston Foster

CFP®, Dip FP, BBus

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.

Preston has worked in financial services for a number of years and has been providing personalised financial planning advice, which includes farm and business succession planning.

To provide the client with the best advice Preston believes it is vitally important to get a deep understanding of their values and objectives.

Preston's academic qualifications include a Bachelor of Business and a Diploma of Financial Planning. He is also a Certified Financial Planner® professional with the Financial Advice Association Australia.

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

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

Preston is an employee and is paid a salary. Preston may be entitled to an annual bonus, if he meets, or exceeds, defined client service, compliance and training standards. As a shareholder of Apt, Preston 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 Preston.

New Zealand Financial Markets Authority - Financial Markets Conduct (Australian Licensees) Exemption Notice 2020

Apt Wealth Partners is registered as a Financial Services Provider in New Zealand (FSP No. 1006652) noted as relying on the above exemption from licensing in New Zealand.

Where Preston provides advice on New Zealand investments, he is required to provide you with a "Disclosure Statement". When Preston provides advice on New Zealand investments, he may be subject to New Zealand jurisdiction.

Preston also has an obligation to be a member of a New Zealand Dispute Resolution Scheme. The obligations of this exemption from Licensing and the contact details of Financial Services Complaints Limited (FSCL) are set out in the "Disclosure Statement".

Where providing a Statement of Advice, to a New Zealand Client or including New Zealand investments, Preston will also include information about this exemption and provide you with links to information on the exemption and to the Disclosure Statement.

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AUTHORISED REPRESENTATIVE NUMBER ISSUED BY THE AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION: 467622

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

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