Rhett Pudney

AFP®, Dip PM, Dip QA, Dip FMBM, Dip TAA, Adv Dip FS (FP), BA (Hons), JP

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.

Rhett is the Head of Compliance and Licensee Operations and has worked in the financial services industry for a number of years.

Rhett holds a Bachelor of Arts (Hons), an Advanced Diploma of Financial Planning, a Diploma of Finance and Mortgage Broking Management, a Diploma of Training and Assessment, Diploma of Quality Auditing and a Diploma of Project Management. Rhett is also a Financial Planner AFP® with the Financial Advice Association Australia (FAAA).

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

As a Credit Representative of Apt Wealth Partners, Rhett is able to assist clients in credit services and credit products.

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

Rhett is an employee and is paid a salary. He may be entitled to a discretionary bonus. 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 Rhett.

Contact Details:

T 02 8262 4000
E rhett@aptwealth.com.au

Level 12, 8 Spring Street
Sydney NSW 2000

AUTHORISED REPRESENTATIVE NUMBER ISSUED BY THE AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION: 1238677
AUSTRALIAN CREDIT LICENCE NUMBER ISSUED BY THE AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION: 500949
AUSTRALIAN FINANCIAL COMPLAINTS AUTHORITY (AFCA) MEMBERSHIP NUMBER (FOR CREDIT PURPOSES): 63898

Rhett 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

Apt.
WEALTH PARTNERS