

ADVISER PROFILE



Sarah Gonzales

AFP[®], BCom (Acc), MAppFin

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.



Sarah is a specialist investment analyst and qualified financial planner with a number of years of experience in Investment and Client Management.

Sarah holds a Bachelor of Commerce in Accounting and a Master of Applied Finance. Sarah is also an Associate Financial Planner[®] with the Financial Advice Association Australia (FAAA).

As an Authorised Representative of Apt Wealth Partners Pty Ltd (Apt Wealth Partners), Sarah is able to assist clients in the areas of:

- Tax-effective investment strategies
- Superannuation strategies
- Direct equities
- Self Managed Superannuation Funds

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

Sarah 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. As a shareholder of Apt, she 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 Sarah.

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Sarah is an authorised representative of Apt Wealth Partners Pty Ltd
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