ADVISER PROFILE

Sean Moran

AFP®, BCom, GDipFP

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.

Sean has worked in financial services for a number of years including 12 years in London and Hong Kong.

He holds a Bachelor of Commerce majoring in Finance as well as a Graduate Diploma in Financial Planning and 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), Sean 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

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

Sean 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.

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 Sean.

Contact Details:

T 03 5221 7557
E sean@aptwealth.com.au

24 Moorabool Street
Geelong VIC 3220

AUTHORISED REPRESENTATIVE NUMBER ISSUED BY THE AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION: 1243324

Sean 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