



Tamara Bellucci

AdvDipFP, BBus, 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.

Tamara Bellucci has over 10 years of experience in Financial Planning which includes working in advice support and client services..

She holds a Bachelor of Business majoring in Finance and International Business and a Graduate Diploma of Financial Planning. She has passed the financial adviser exam.

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

- Tax-effective investment strategies
- Superannuation strategies
- Retirement planning
- Centrelink entitlements
- Direct equities
- Life insurance (life, TPD, trauma, income protection, business expenses)
- Estate planning
- Salary Packaging

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

On a personal level, Tamara enjoys keeping fit, travelling and spending time with her large, close-knit family, including recent addition, daughter, Adriana.

Tamara 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.

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 Tamara.

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Tamara is an authorised representative of Apt Wealth Partners Pty Ltd
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