



Warner Leung

CFP®, MApp Fin, SSA

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.

Warner Leung has more than 15 years' experience working in financial services and providing personalised financial planning and investment advice.

Warner's qualifications include a Masters of Applied Finance and a Bachelor of Finance. Warner is also a Certified Financial Planner® with the Financial Advice Association Australia (FAAA) and a Self-Managed Super Fund Specialist (SSA).

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

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

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

Warner 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.

In his spare time, Warner enjoys being active playing soccer, tennis and attending F45 classes with his partner, Helena. He also volunteers his time with the Cancer Council providing financial literacy advice with cancer patients and is also the Treasurer of the Gladesville Ravens Sports Club.

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 Warner.

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