Apt.

WEALTH PARTNERS

Investing in your future starts with choosing the right partner

Your personal guide to financial security

Having control of your money. Achieving your goals. Knowing your financial future is secure.

That's what wealth creation is all about. And it can impact every aspect of your life from health and well-being, to relationships and life choices.

Setting out on the road to financial independence can seem complicated. But it's not. Having the right partner to guide you along the way makes the journey so much easier to navigate.

Discovery

At our first meeting we want to get to know you too understand your personal situation and aspirations.

Design

We design a financial strategy with the mix of services that most closely matches your goals and objectives.

Execute

We begin executing the plan for you. As your personal CFO, you can get as involved as you like, or just leave it to us.

Review

Like any good process, our regular reviews ensure we're always on top of the inevitable changes that come up.

Partnering with us

Money is complex. We make it simple
Rely on us to cut through the clutter, explain complex issues in plain terms, and recognise what matters for your circumstances.

We provide a tailored blueprint
Every important journey starts with a map. We can show you how to achieve your financial goals (and what to avoid) with a blueprint tailored exclusively to your needs.

You're time poor. We're knowledge rich
When you partner with us, you're free to focus on what you do best, knowing we're hard at work behind the scenes doing what we do best – researching asset markets, staying abreast of new legislation, and refining strategies to grow your wealth. It means you can concentrate on enjoying life today while we help you enjoy a better tomorrow.

We're your personal Chief Financial Officer
Partnering with us can be the start of something special – your personal journey of wealth creation. It's not just about knowing the rules and having strategies. The real driver of success can be having your Apt Adviser act as a money mentor, or personal CFO, who genuinely wants you to succeed.

Because now's the time to invest in experience
The financial world has never been more complex due to the vast array of options available. It pays to get things right – first time around.

Why Apt?

Apt Wealth Partners has a team of over 40 people, supporting the wealth aspirations of thousands of Australians just like you.

We like taking the time to understand you
Your needs, your goals, your dreams. After all, it's your money and your future.

We're good at making the complex simple
We don't use jargon to impress clients or try to confuse you with numbers. We know you want straightforward solutions, backed by clear advice that explains how you can reach your aspirations. And that's what we deliver.

We believe your trust has to be earned
No one values your money more than you and we understand that. But no one values your goals more than us. That's why we make helping you achieve financial security our top priority. This creates a level of trust that allows us to forge true and lasting partnerships with our clients.

We invest in you for the long term
Building wealth doesn't happen overnight. But it will happen with our support. We focus on you, not the size of your wallet, and we make a long-term commitment to help you achieve your goals. After all, your success is the best measure of our success. So, no matter where you are on your journey towards wealth creation and financial security, we'll be right there with you at every stage. Guaranteed.

We only answer to you
Our advice reflects our analysis, our experience, our understanding of your needs and a genuine desire to help you achieve the very best. We're answerable to you, our client, and no one else.

Your Apt financial toolkit

Once we've developed your personal financial strategy, you'll have access to our full portfolio of services. Together with your Apt Adviser, you'll decide which options best match the objectives and goals in your plan.

Superannuation and Investments

Estate Planning

Retirement Planning

Government Entitlements and Aged Care

Home and Property Loans

Self Managed Super Funds

Start the journey today

Our clients continually tell us how rewarding it is to take charge of their money and their future, to achieve their goals, and give their families the very best.

Call us today on 1800 801 277 to discover the steps you need to take to achieve your goals and enjoy a richer, more rewarding financial future. With our expert help, you can get there.

Apt.
WEALTH PARTNERS

info@aptwealth.com.au
1800 801 277
aptwealth.com.au

Apt.

WEALTH PARTNERS

Sydney
Level 28, 31 Market Street,
Sydney NSW 2000
02 8262 4000
sydney@aptwealth.com.au

Melbourne
Level 8, 360 Collins Street,
Melbourne VIC 3000
03 8779 5254
melbourne@aptwealth.com.au

Geelong
24 Moorabool Street,
Geelong VIC 3220
03 5221 7557
geelong@aptwealth.com.au

PROFESSIONAL PRACTICE
FINANCIAL PLANNING ASSOCIATION of AUSTRALIA