



ifa EXCELLENCE AWARDS 2019

Principal Partner



Apt Wealth Partners shortlisted in the ifa Excellence Awards.

Apt Wealth Partners has been named as a finalist for Boutique Advice Firm of the Year in the ifa Excellence Awards 2019.

Celebrating its sixth year, the ifa Excellence Awards is the pinnacle event for the nation's independent financial advice sector, recognising the outstanding success of Australia's independent and non-aligned advice community, including advisers, licensees, support staff and practices.

The finalist list, which was announced on 18 July, features over 140 high-achieving finance professionals across 20 categories, with 9 firms vying for the prestigious Boutique Firm of the Year award.

"The past year has been a difficult one for the industry but the ifa Excellence Awards is a chance to honour and showcase an industry that strives to be a guiding light in the lives of its customers," said ifa editor James Mitchell.

James McGregor, Managing Director at Apt Wealth Partners, said that this is a recognition of the dedication and hard work done by the wider Apt team. "We see this award as recognition of not just Apt, but the entire team that works with us. It's a reward for our efforts to deliver for more than 3000 clients across Australia. Our team work tirelessly to ensure that our clients are supported and have the ability to live for today while planning for tomorrow," he said.

"It's an honour to be recognised by the ifa, and we look forward to the award ceremony," James added.

The winners will be announced at a five-star gala dinner on Friday 6 September at the Four Seasons Hotel, Sydney.

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MEDIA CONTACT

Luke Maddison

Phone: 0409053177

Email: luke@cpwrite.com.au

About Apt Wealth Partners

At Apt Wealth Partners, our focus is on helping you navigate the financial journey, ensuring that you can still live for today while keeping an eye on tomorrow. To learn more visit www.aptwealth.com.au