

ENJOY A LIFE THAT'S NOT SO RETIRING AFTER ALL

Retirement should be everything you hope for. A time to enjoy life on your own terms, backed by the peace of the mind that financial security brings.

NOW IT'S ALL ABOUT YOU

Retirement looks different for everyone. For some it is a point in time when work stops, and a new phase of life begins, for others it can be gradual phase out of work. Whatever your circumstances, our goal is to make it simple with financial advice that lets you maximise the opportunities of this exciting life stage.




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Sydney | Melbourne | Geelong



PLANNING YOUR RETIREMENT STARTS WITH CHOOSING THE RIGHT PARTNER

HOW WE WORK WITH YOU



Discovery

We want to get to know you, understand your personal situation, goals and objectives.



Design

We design a financial strategy with a mix of services that match your goals and objectives.



Execute

We manage the plan as your personal CFO. You can get as involved as you like, or just leave it to us.



Review

Our regular reviews ensure we're always on top of inevitable changes that come up.

RETIREMENT IS A TIME TO INVEST IN EXPERIENCE

With a skilled team of over 40 professionals, Apt Wealth Partners has been helping Australians achieve their financial goals for over 30 years. We've helped our clients navigate everything from 'the recession we had to have' to the global financial crisis, and we can help you forge a personal path to financial security in retirement.

WE ONLY ANSWER TO YOU

The advice we share reflects our analysis, experience, understanding of your needs, and genuine desire to help you achieve a financially secure retirement.

WE MAKE THE COMPLEX SIMPLE

Our goal is to impress you with results – not confuse you with jargon. You will always understand where your money is invested with Apt, and whenever you have questions, we'll be here to provide answers.

WE INVEST IN YOUR GOALS

Retirement means different things to each of us. That's why our first step is simply getting to know you. No hard sell. No one-size-fits-all plans.

WE'RE COMMITTED TO YOU

Our track record speaks for itself. We plan to partner with you over the years ahead, fine-tuning your financial plan in response to changes in markets or your lifestyle needs.

The information provided in this publication does not constitute financial product advice. The information is of a general nature only and does not take into account your individual objectives, financial situation or needs. It should not be used, relied upon, or treated as a substitute for specific professional advice. Apt Wealth Partners (AFSL and ACL 436121 ABN 49 159 583 847) and Apt Wealth Home Loans (powered by Smartline ACL 385325) recommends that you obtain professional advice before making any decision in relation to your particular requirements or circumstances.



PROFESSIONAL PRACTICE
FINANCIAL PLANNING ASSOCIATION of AUSTRALIA