

# Ageing With Grace

Advisory

**Ageing With Grace Advisory Pty Ltd**  
**Financial Services Guide (FSG) Part 2 of 2**  
**Adviser Profile**  
AFSL 515107

12th February 2026



Navigating Aged Care, *Together.*

## Licensee and Authorisation

Ageing With Grace Advisory Pty Ltd is a Corporate Authorised Representative of **SWM (Aust) Pty Ltd (AFSL 515107)**.

All advisers listed in this document are Authorised Representatives of SWM (Aust) Pty Ltd and provide financial services under its Australian Financial Services Licence.

This document forms **Part 2 of the Financial Services Guide** and should be read together with Part 1 of the FSG.

## Financial Services Authorised

All advisers listed below are authorised to provide personal financial advice and deal in the following financial products:

- Deposit and cash products
- Superannuation
- Retirement savings accounts
- Government debentures, stocks and bonds
- Securities (including listed shares)
- Managed investments

Advice is provided in the context of aged care and later-life planning needs.

## Remuneration and Benefits

All advisers are employed by **Story Wealth Management (Aust) Pty Ltd** and provide financial services under the AFSL held by SWM (Aust) Pty Ltd.

Advisers are remunerated by way of salary and may be eligible to receive performance-based incentives in accordance with Story Wealth Management's remuneration policies.

Ageing With Grace Advisory Pty Ltd operates as a Corporate Authorised Representative of SWM (Aust) Pty Ltd. All fees for financial advice services are received by SWM (Aust) Pty Ltd.

No adviser receives referral fees or commissions from third parties in relation to the aged care advice services provided under Ageing With Grace Advisory Pty Ltd.

## Individual Adviser Details

### Sarah Leslie

**Authorised Representative Number:** 295141



Sarah specialises in aged care and later-life financial advice, supporting individuals and families to navigate complex decisions regarding care accommodation, government entitlements and long-term financial strategy. She works closely with clients to provide clarity around aged care costs and funding options, helping families feel informed and confident when making important decisions during times of transition.

Sarah is a Director and shareholder of Story Wealth Management (Aust) Pty Ltd, SWM (Aust) Pty Ltd and Ageing With Grace Advisory Pty Ltd. As a result, she may benefit from the overall financial performance of these businesses through salary, dividends or shareholder returns.

## Individual Adviser Details

### Kara Treeby

**Authorised Representative Number:** 405847



Kara specialises in aged care strategy and later-life financial planning, assisting families to make informed and considered financial decisions during significant life transitions. She brings a strategic perspective to structuring assets and managing aged care costs, ensuring advice is practical, well-structured and aligned with each client's broader financial position and goals.

Kara is a Director and shareholder of Story Wealth Management (Aust) Pty Ltd, SWM (Aust) Pty Ltd and Ageing With Grace Advisory Pty Ltd. As a result, she may benefit from the overall financial performance of these businesses through salary, dividends or shareholder returns.

## Individual Adviser Details

### Jessica Cooke

**Authorised Representative Number:** 1272284



Jessica supports clients through aged care transitions, assisting with financial modelling, government entitlement assessments and implementation support.

She works closely with families to analyse funding options, coordinate documentation and liaise with relevant parties, helping ensure strategies are implemented smoothly and that clients feel supported throughout what can often be an overwhelming process.

## **Complaints**

If you have a complaint about the services provided by your adviser, details of how to make a complaint are set out in Part 1 of the Financial Services Guide.