

ORD MINNETT

Paul Richardson

Private Wealth Adviser

Building wealth for generations

Ord Minnett is an Australian owned advice and investment services firm. We offer financial advice and investment management for individuals, families, businesses and organisations, enabling them to protect and grow their wealth.



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Qualifications

- Graduate Diploma of Financial Planning
- Graduate Diploma of Applied Corporate Governance
- Diploma of Financial Planning
- Bachelor of Accounting

Certifications

- Fellow of the Governance Institute of Australia

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Paul brings over 25 years of experience to the financial services sector, having provided tailored advice to clients since 1998. He spent a significant 22 years at Macquarie Bank, where he held various roles, primarily as a manager and Senior Investment Adviser, delivering a broad spectrum of financial planning and stockbroking services.

Now at Ord Minnett, Paul focuses his expertise on superannuation and portfolio construction, assisting clients in growing their wealth and achieving their financial and lifestyle goals. Paul is committed to offering a high level of customer service and actively analysing market trends to ensure his clients' portfolios remain aligned with their objectives.

For his clients, Paul's key areas of focus include providing comprehensive financial advice, specialising in superannuation and self-managed super funds (SMSFs), offering thorough retirement planning services, and delivering expert stockbroking and investment services.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research