

**ORD MINNETT**

**Julian Reeves**

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.



# Julian Reeves

Private Wealth Adviser

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## Qualifications

- Master of Financial Planning, RMIT University
- Bachelor of Commerce (Honours), The University of Melbourne

## Certifications

- Chartered Financial Analyst (CFA), CFA Institute
- Accredited Derivatives Adviser Level 1 & 2
- Foreign Exchange (Knowledge and Skills)
- Margin Lending
- Superannuation

## Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Superannuation & SMSF

## Background

Drawing from more than 25 years of experience in financial markets, Julian provides expert guidance, shaped by his time at the Reserve Bank of Australia, the Commonwealth Government, and JP Morgan.

He serves a diverse range of clients, including families, self-managed super funds (SMSFs), and family offices. Julian specialises in multi-asset and international investment strategies tailored to Australian clients. He offers customised advice and portfolio management to business executives, not for profit organisations, and private investors, drawing on his strong foundation in investment education.

Julian skilfully manages portfolios for high net worth individuals, SMSFs, and various institutions, constructing strategies that align with clients' specific goals while balancing risk and return.

By leveraging Ord Minnett's research and analyst network, he helps clients navigate today's complex investment landscape and work toward achieving their financial objectives.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research