

ORD MINNETT

Ross Williams

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.



Ross Williams

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Qualifications

- Diploma of Business
- Diploma of Financial Services

Certifications

- Margin Lending

Areas of Advice

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

Background

Specialising in strategic portfolio management, Ross' approach is aimed at both preserving and enhancing client wealth. He joined E.L & C. Baillieu in April 2015 - subsequently acquired by Ord Minnett - and has cultivated a robust career in financial services since 1999, encompassing financial planning and stockbroking.

Ross provides a comprehensive suite of services, including holistic investment counsel, execution of Australian and international equity trades, bespoke portfolio management, and access to new issues and capital raisings. His expertise extends to cash and fixed-interest instruments, as well as superannuation advisory.

Leveraging his extensive industry experience and client-centric philosophy, Ross is committed to delivering tailored financial solutions that precisely align with each client's distinct financial objectives.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research