ORD MINNETT

Andrew Tate

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

- Diploma of Financial Planning, Kaplan Professional

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Superannuation

Areas of Advice

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

Background

Andrew joined Ord Minnett in 2012 as a specialist equities adviser. Prior to Ord Minnett, Andrew spent seven years at Baker Young Stockbrokers. The tenure at Baker Young included managing a derivatives trading desk, while providing advice in options and futures trading. Before entering the financial services industry, Andrew held a number of senior management roles in the IT Services industry.

With more than 15 years' experience in the investment advice and financial services industry, Andrew provides advice to both retail clients and sophisticated and professional investors.

The advice includes investment and portfolio management services encompassing Australian and international equities, exchange traded funds (ETFs), listed investment companies (LICs) and listed interest rate securities.

Andrew is an authorised financial planner with extensive expertise in derivatives and is very active in the equity capital markets space.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research