ORD MINNETT

Dwight Clark

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.

Dwight Clark

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Qualifications

- Diploma of Financial Planning, Deakin University
- Bachelor of Business (Finance & Economics), Edith Cowan University

Certifications

- Certified Financial Planner (CFP), Financial Planning Association of Australia
- Self Managed Superannuation Fund (SMSF) Adviser

Areas of advice

- Asset allocation
- Investment strategies
- Life risk insurance
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Dwight's primary responsibilities involve providing strategic advice to a select group of clients, including successful individuals, family businesses, and for-purpose organisations. With over 24 years of experience, he specialises in taxation, superannuation, philanthropy, wealth security, and succession planning.

Before joining Ord Minnett, Dwight spent two years with E.L. & C. Baillieu and held senior roles at TWD, a boutique wealth advisory firm, as well as at the nationally established JBWere.

Dwight is also very active in the WA Philanthropic & for-purpose sector, offering consulting and compliance support to philanthropic, corporate, social entrepreneur, and for-purpose clients. He has contributed to both local and national research in the sector and has played a role in shaping government policy for the social sector.

While Dwight provides a comprehensive approach to wealth management, he tailors his services to suit each client's unique needs, preferences, and circumstances. His expertise spans cash flow management and financial modelling, structuring, superannuation, risk management, succession planning, and investment strategy.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research