

ORD MINNETT

Emma Trengove

Senior 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 in Applied Finance and Investment, Securities Institute of Australia
- Bachelor of Commerce, Adelaide University

Areas of Expertise

- Asset allocation
- Investment strategies
- Margin lending
- Investment implementation
- Portfolio management
- International investing
- Socially and environmentally responsible investing
- General Investment advice

Background

During Emma's 20+ years of experience in financial markets and wealth management, she has assisted a diverse range of clients - from younger professionals to retirees, not-for-profits to family offices - with personalised and value aligned investment advice.

She specialises in providing clear financial advice that is personalised and allows clients to navigate the complexities of financial markets, to better manage and grow their wealth.

Emma aims to identify opportunities for clients that deliver positive impacts and a competitive financial performance, while incorporating thematicatics that are of importance to clients and their families.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research