

**ORD MINNETT**



**Richard Batt**

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.



# Richard Batt

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Connect with me on 

## Qualifications

- Bachelor of Commerce, University of Tasmania

## Certifications

- Certified Financial Planner (CFP), Financial Planning Association of Australia
- Company Directors course, Graduate of the Australian Institute of Company Directors (GAICD)
- Master of the Stockbrokers and Investment Advisers Association of Australia (MSIAA)

## Areas of Advice

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

## Background

A financial adviser with over 20 years of experience, Richard joined Ord Minnett in 2021. He has a genuine passion for investing in direct equities and specialises in delivering tailored investment and financial planning advice to a diverse range of clients.

Richard focuses on helping clients identify their personal and financial goals, working closely with them to develop long-term strategies for wealth accumulation that are aligned with their unique circumstances and objectives.

Beyond his professional work, Richard is deeply engaged in his local community. He currently serves as a Board Member of Heli-Rescue Tasmania Limited and is a Past Commodore of the Royal Yacht Club of Tasmania (RYCT). He has also chaired the Regional Advisory Committee representing yacht clubs across Tasmania.

In addition, Richard is a member of the Bellerive Yacht Club (BYC) and Cricket Tasmania. He also serves on the Advisory Board of St John's School in Richmond and is a Past President of The Friends' School Old Scholars Association.



Financial Planning



Investment Advice & Strategy



Portfolio Construction & Management



Portfolio Reporting & Administration



Superannuation & SMSF



Stockbroking



Retirement Planning



Philanthropic Giving



Investment & Market Research