ORD MINNETT

Scott Green

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
- Graduate Certificate in Oil & Gas Engineering, University of Western Australia
- Bachelor of Civil Engineering, University of Western Australia

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Life risk insurance
- Retirement planning
- Superannuation & SMSF

Background

Scott is based in Perth and also spends time servicing clients in regional Western Australia, including in Geraldton. His focus is on tailored portfolio management within a robust financial planning framework. By carefully considering each client's objectives, circumstances, preferences, and risk tolerance, Scott applies a systematic approach to asset allocation, constructing and routinely managing portfolios to meet individual needs.

Customer service has been central to Scott's entire career. Before joining E.L. & C. Baillieu in 2017, he spent six years in a similar role with Morgans Financial, following a 15-year career as an Engineer and Project Manager in the oil and gas services industry.

With over 13 years of experience in the finance industry, Scott delivers a broad spectrum of investment and financial planning advice. His expertise includes ASX-listed securities such as shares, bonds, and hybrids, as well as exchange traded funds (ETFs), superannuation, life insurance, taxation, managed investments, margin lending, and derivatives.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research