# Stuart Harris

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.

# Stuart Harris

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## Qualifications

- Master of Financial Planning, Kaplan Professional
- Bachelor of Commerce (Accounting & Finance), University of Adelaide

## Areas of advice

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

## Background

Stuart's passion for financial advice runs in the family, with Stuart following his father's footsteps as a financial adviser. Stuart admired his father's dedication to his clients' needs, learning from his never-ending willingness to help people improve their financial situation and form life-long relationships.

Stuart has been with Ord Minnett since 2020, where he joined as an Adviser Assistant, and after several years of hard work and training, has become a Private Wealth Adviser. He has and continues to work closely with senior advisers at Ords, gaining valuable experience.

Prior to joining Ord Minnett, Stuart worked for BT Financial Group in their Multi-Platform team, providing exceptional service to financial advisers around Australia.

Stuart sincerely enjoys interacting with clients from various backgrounds and having a meaningful impact on their lives by helping them achieve their financial goals, gain financial security and plan for the future.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research