ORD MINNETT

Adrian Leppinus

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 of Applied Finance and Investment, FINSIA
- Bachelor of Commerce, The University of Sydney

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies

Background

Adrian became a Private Wealth Adviser in 2015 and brings over 25 years of experience in financial markets, working with a diverse clientele including high net worth individuals, family offices, and institutional clients.

His extensive experience equips him with a deep understanding of navigating varying market conditions. Adrian specialises in helping clients achieve their financial goals through a client-centric approach. He prioritises gaining a thorough understanding of each client's specific aspirations, complemented by comprehensive research into the underlying investments. This dual focus allows him to develop well-informed and tailored strategies designed to help clients succeed in both favourable and challenging economic climates.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research