ORD MINNETT

# Amelia Teasdale

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

## Certifications

- Chartered Accountant, Institute of Chartered Accountants Australia
- Superannuation
- Margin Lending

## Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Superannuation & SMSF
- Tax (financial) advice

## Background

Amelia joined Ord Minnett 20 years ago as a dedicated Private Wealth Adviser, bringing with her a wealth of experience in the finance industry.

Her career includes valuable international exposure and a strong foundation in financial services, having previously worked in the UK in Risk Management for J.P. Morgan and in Corporate Finance at PricewaterhouseCoopers. Amelia's primary focus is on providing specialised investment advice to private clients in lower tax environments. These include self-managed super funds (SMSFs), private ancillary funds, and charitable foundations.

Amelia leverages her deep understanding of financial markets and regulatory frameworks to develop tailored strategies that align with her clients' unique circumstances and long-term financial objectives, ensuring a considered and effective approach to wealth management. She also holds a professional membership with the Stockbrokers and Investment Advisers Association (SIAA) and is a Qualified Tax Relevant Provider under ASIC.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research