

ORD MINNETT

Brett Waller

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

- Master of Financial Planning, Kaplan Professional
- Graduate Diploma of Financial Planning, Kaplan Professional
- Professional Diploma in Stockbroking, Stockbrokers and Investment Advisers Association (SIAA)

Certifications

- Certified Financial Planner (CFP), FPAS Singapore
- Life Risk Specialist, Deakin University
- Responsible Executive Examination, ASIC Market Integrity Rules & ASX Clear Operating Rules

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Brett is an experienced Senior Private Wealth Adviser assisting high net worth families globally to grow and protect their wealth through diversified investments.

Following more than 25 years with a major Australian bank, Brett spent eight years as Senior Vice President of a Fortune 500 Company in Singapore and Hong Kong, providing high-level financial planning and investment advice. A pioneer in investment migration, Brett established Ord Minnett's Visa Investment Service in 2012 and is a key adviser for Investor and Significant Investor Visas. Brett offers personalised service across wealth management, asset protection, and estate planning, including self-managed super funds (SMSFs) and family trusts, via diverse asset classes. Brett is a Master Practitioner Member of the Stockbrokers and Investment Advisers Association (SIAA).

Licensed in Australia and Hong Kong, Brett provides specialist wealth creation advice for expats in the region, leveraging data and analysis to help clients achieve their long-term financial goals. Brett also specialises in providing investment solutions and advice for Hong Kong's residence-by-investment visa, the Capital Investment Entrant Scheme (CIES).



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research