ORD MINNETT

Callum Bryant

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 Financial Planning, Kaplan Professional
- Bachelor of Commerce (Finance), UNSW
- Bachelor of Economics (Financial Economics), UNSW

Areas of Advice

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

Background

Callum joined Ord Minnett in 2019 and has since established himself as a Private Wealth Adviser, building on several years of valuable experience supporting senior advisers in an assistant capacity. His primary focus is to empower individuals from all stages of life by building tailored investment strategies and robust portfolios that have a tangible and positive impact on their financial wellbeing.

In preparing his well-considered investment decisions, Callum draws upon the substantial experience and in-depth research provided by Ord Minnett's dedicated research department and seasoned senior investment advisers. His key areas of expertise include the provision of tailored investment advice, where he focuses on constructing and managing investment portfolios meticulously aligned with each client's specific needs. These portfolios are strategically invested across various asset classes, with a particular emphasis on ASX-listed products, bonds, managed portfolios, and managed funds, ensuring a diversified approach.

Callum provides tailored superannuation advice, helping clients consider structures and strategies that align with their financial and retirement goals, including tax-aware investment options. Furthermore, he assists clients with proactive retirement planning and succession planning, ensuring a comfortable and secure transition from their working life.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research