ORD MINNETT

Con Maglis

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

- Advanced Diploma of Financial Planning, Kaplan Professional
- Diploma of Financial Services (Financial Planning), Kaplan Professional
- Bachelor of Commerce (Accounting & Finance), The University of Notre Dame Australia

Areas of Advice

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

Background

Con Maglis is a highly regarded Senior Private Wealth Adviser and Investment Adviser with extensive experience advising not-for-profit organisations, C-suite executives, and ultra-high net worth families.

With a deep understanding of the complexities of significant wealth management, Con delivers tailored investment strategies and strategic financial guidance to help clients achieve their long-term objectives. Since 2010, Con has been a trusted adviser, offering insights that support financial security and growth. Passionate about purpose driven investing, he collaborates with philanthropists and charities to maximise their impact.

Recognised as one of Barron's Top 150 Advisers in 2024, Con specialises in bespoke wealth management solutions. He leverages his expertise for clients across investment management and portfolio construction, while also focusing on Investment Policy Statements, not-for-profits and private ancillary funds (PAFs).

- Financial Planning
- Investment Advice & Strategy
- Portfolio Construction & Management
- Portfolio Reporting & Administration
- Superannuation & SMSF
- Stockbroking
- Retirement Planning
- Philanthropic Giving
- Investment & Market Research