ORD MINNETT

David Stewart

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 Commerce (MCom), Macquarie University
- Master of Business Administration (MBA), Macquarie University

Certifications

- Company Directors Course, Graduate of the Australian Institute of Company Directors (GAICD)
- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending

Areas of Advice

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

Background

David was recruited by Ord Minnett after more than two years at the Sydney Stock Exchange, where he developed key skills in clearing, risk, and IT management within equity derivative markets.

Now, with over thirty years of experience, he enthusiastically provides advice on asset allocation, superannuation, shares, options, and fixed interest (including wholesale bonds) to a diverse clientele, from individuals to charitable foundations and peak bodies.

David focuses on the development and ongoing management of tailored portfolios, which can include core and trading portfolios (comprising shares, exchange traded funds (ETFs), and other listed vehicles), specialist managed funds, wholesale bonds and other fixed interest instruments, and the strategic use of options to enhance portfolio returns.

David's approach to asset allocation and investment tempo is driven by the unique requirements of each client, rather than a standardised solution. He is also a member of the Global Association of Risk Professionals (GARP).

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research