

ORD MINNETT

Douglas Read

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.



Douglas Read

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Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Graduate Diploma of Applied Finance and Investment, FINSIA
- Bachelor of Economics (Economics & Finance), The University of Sydney

Areas of Advice

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

Background

Since 2015, Douglas has been a driving force in providing insightful investment and financial planning advice. His deep understanding of financial markets took root in 2003 at J.P. Morgan, and since 2008, he has expertly guided clients, accumulating a robust 17 years of advisory experience.

Douglas's career trajectory includes valuable tenures at some of Australia's most respected wealth management firms, including Morgan Stanley, where he honed his skills and market acumen. He empowers clients through comprehensive strategies encompassing portfolio construction and dynamic management, astute share trading ideas, strategic fixed income investing, navigating foreign currency markets, implementing sophisticated option strategies, and accessing exclusive initial public offerings (IPOs) and wholesale bond opportunities.

Douglas provides clarity and direction in critical areas such as superannuation and self-managed super funds (SMSFs), retirement planning, strategic asset allocation, tailored insurance solutions, and thoughtful estate planning, ensuring his clients feel confident and well-supported in achieving their diverse financial aspirations.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research