Eric Wong

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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D: 02 8216 6888
T: 02 8216 6300
E: ewong@ords.com.au

Ord Minnett
Grosvenor Place
Level 18, 225 George Street
Sydney NSW 2000
ords.com.au

Qualifications

- Graduate Diploma of Applied Finance and Investment, Securities Institute of Australia
- Bachelor of Commerce (Marketing), UNSW

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

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

Background

Eric joined Ord Minnett from Macquarie Private Wealth in 2018, bringing more than 20 years of experience advising high net worth individuals, trusts, and superannuation funds.

His focus is on delivering investment strategies, structures, and portfolios tailored to his clients' situations, financial goals, and risk profiles. Eric is committed to supporting his clients throughout their investment journey, from wealth accumulation to establishing and maintaining financial independence. His extensive expertise covers direct Australian and international equities, listed property trusts, managed funds, derivative strategies, and fixed interest.

Understanding the evolving nature of clients' circumstances and risk attitudes, Eric provides valued advice and guidance as they navigate their path to financial independence.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research