

ORD MINNETT

Kevin Shen

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 in Financial Planning, Kaplan Professional
- Advanced Diploma Financial Planning, AAMC Training Group
- Diploma of Financial Services (Financial Planning), AAMC Training Group

Certifications

- Tax for Financial Advising, Kaplan Professional
- Commercial Law, Kaplan Professional

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Kevin brings over a decade's worth of experience in the financial planning industry and is dedicated to helping clients achieve long-term financial success. He provides holistic advice tailored to each client's goals, with a focus on building and preserving wealth, and intergenerational wealth transfer.

He takes a collaborative approach, working closely with clients' accountants, solicitors, mortgage brokers, and other trusted professionals to ensure a seamless and integrated strategy. Kevin is passionate about supporting high net worth individuals, families, and business owners in achieving and maintaining financial freedom.

His commitment to personalised service and strategic advice ensures clients receive guidance that evolves with their needs, delivering confidence and clarity at every stage of their financial journey.



Financial Planning



Portfolio Reporting & Administration



Retirement Planning



Investment Advice & Strategy



Superannuation & SMSF



Philanthropic Giving



Portfolio Construction & Management



Stockbroking



Investment & Market Research