

**ORD MINNETT**

# Lachlan Cameron

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 6533  
E: [lcameron@ords.com.au](mailto:lcameron@ords.com.au)

Ord Minnett  
Grosvenor Place  
Level 18, 225 George Street  
Sydney NSW 2000  
[ords.com.au](http://ords.com.au)

## Qualifications

- Graduate Diploma in Applied Finance and Investment, Securities Institute of Australia
- Bachelor of Business, University of Technology Sydney

## Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending
- Superannuation

## Areas of Advice

- Asset allocation
- Investment strategies
- Superannuation & SMSF

## Background

Lachlan brings more than 20 years of experience as a Financial Adviser and investment professional, working closely with a diverse clientele ranging from high net worth individuals and self-managed super funds (SMSFs) to the not-for-profit sector.

He offers an experienced and reasoned approach to both investment advice and portfolio management, ensuring his clients feel well-informed and confident that their investments are being managed appropriately. Lachlan has extensive experience in developing customised portfolio constructions and providing ongoing portfolio management.

Lachlan's balanced and reasoned approach to investment advice specifically considers strategic asset allocation to align each client's investment strategy with their unique investment goals and risk profile, fostering a sense of security and understanding.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research