# Larry Tee

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

- Professional Diploma in Stockbroking, Stockbrokers Association of Australia
- Bachelor of Commerce (Actuarial Studies & Finance), UNSW

## Certifications

- CFA Program - Level 1
- Accredited Derivatives Adviser Level 1 & 2

## Areas of Advice

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

## Background

Larry is a seasoned Private Wealth Adviser with more than 20 years of deep engagement in financial markets, beginning his journey in 2003 with American Express Private Bank in Singapore. His career progressed through Commonwealth Securities to Commonwealth Bank Institutional Equities, where he honed his expertise as an Equity Derivatives Trader, managing the bank's own trading portfolio.

This extensive background equips Larry to provide sophisticated strategic advice to high net worth individuals and institutional clients, expertly employing derivatives, margin lending, and other advanced strategies focused on robust wealth creation, consistent income generation, and effective capital protection. Larry excels at forging trusted, enduring relationships, guiding clients through intricate financial landscapes and significant life transitions with clarity and unwavering confidence. His profound knowledge spans Australian equities, strategic fixed interest investing for income and capital preservation, sophisticated use of derivatives for income enhancement and risk management, tailored portfolio management aligned with individual goals, and global equities for diversification.

He also provides expert guidance on superannuation and self-managed super funds (SMSFs), optimising retirement outcomes through strategic structuring and investment.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research