Luke Headland

Senior 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 of Applied Finance
- Graduate Diploma of Financial Planning
- Professional Diploma in Securities & Derivatives
- Diploma of Financial Services (Financial Planning)

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

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

Background

Luke has been a valued member of Ord Minnett since 2003. He is a recognised leading expert in the Australian Significant Investor Visa and a specialist in constructing diversified direct investment portfolios.

Luke is a trusted Adviser, providing strategic and holistic financial advice to high net worth individuals, families, and business owners. His areas of expertise are broad, encompassing the intricacies of the Significant Investor Visa program, direct investments in Australian and international shares and bonds, specialist advice on self-managed super funds (SMSFs), comprehensive retirement planning, navigating business exits, providing guidance on deceased estates and inheritance matters, and strategic succession planning for future financial security.

Luke is dedicated to providing tailored and insightful advice to help his clients achieve their diverse financial objectives.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research