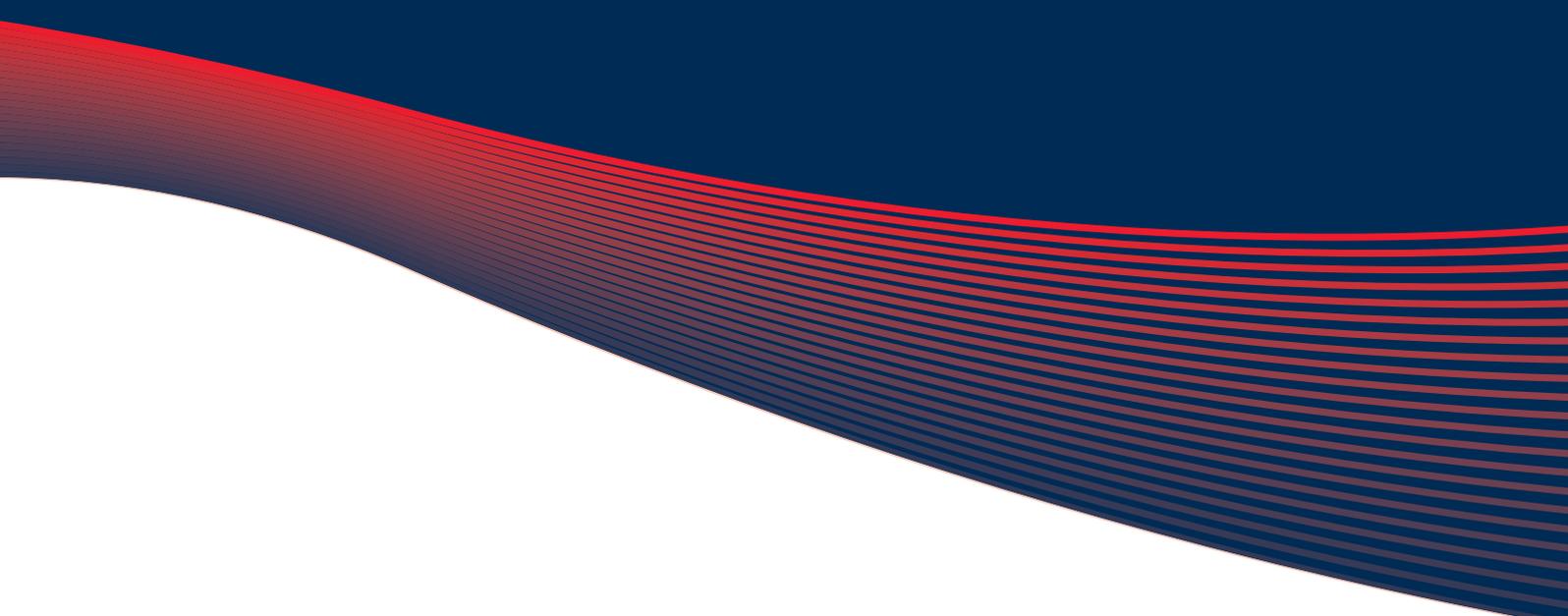


ORD MINNETT



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.



Luke Headland

Senior Private Wealth Adviser

M: 0407 781 301

E: lheadland@ords.com.au

Ord Minnett

Grosvenor Place

Level 18, 225 George Street

Sydney NSW 2000

ords.com.au

Connect with me on 

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