

**ORD MINNETT**

**Mitchell Bogdanov**

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.



# Mitchell Bogdanov

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Ord Minnett

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## Qualifications

- Bachelor of Commerce (Finance & Financial Planning), Deakin University

## Certifications

- Accredited Derivatives Adviser Level 1

## Areas of Advice

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

## Background

Mitchell has been a valued member of Ord Minnett for more than five years and has steadily progressed into a lead advisory role, reflecting his commitment to achieving strong outcomes for clients. He has served as a Private Wealth Adviser within a collaborative team for more than three years, building upon more than two years of experience supporting senior private wealth advisers as an assistant.

Mitchell also brings valuable client service experience from boutique financial planning firms. He excels at establishing strong rapport with a diverse clientele, including high and ultra-high net worth families, providing trusted advice tailored to their unique financial goals and objectives, which encompass wealth accumulation, wealth preservation, and the creation of consistent income streams.

Mitchell is known for his proactive approach in identifying opportunities to add significant value and delivering tailored solutions across direct investments, superannuation strategies, and the intricacies of intergenerational wealth transfer.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research