ORD MINNETT

# Mitchell Cook

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 Financial Planning, Kaplan Professional
- Bachelor of Resource Economics, The University of Sydney

## Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies

## Background

Mitchell joined Ord Minnett in 2015, bringing valuable experience from the financial services industry.

Drawing on a solid foundation of financial and stockbroking expertise, Mitchell provides tailored direct investment advice to a select group of private individuals and families, high net worth individuals, not-for-profit organisations, and institutions. He specialises in tailoring client portfolios and structuring their assets to include a balanced mix of Australian and international equities, fixed interest instruments, cash management services, initial public offerings (IPOs), and other capital raisings.

Mitchell is dedicated to crafting comprehensive investment plans that assist clients in achieving their personal financial goals. He provides ongoing monitoring, reviews, and updates to strategies and investment portfolios to ensure goals remain on track and any changes in personal or financial circumstances are addressed.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research