ORD MINNETT

Peter Thomas

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.

Peter Thomas

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Qualifications

- Graduate Diploma in Applied Finance and Investment, Securities Institute of Australia

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending

Areas of Advice

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

Background

Peter brings more than 31 years of experience to the finance industry, including 28 years as a Private Wealth Adviser at Ord Minnett.

His long-standing client relationships benefit from his expert understanding of investment strategies focused on building both wealth and income while effectively navigating market volatility. Peter specialises in private funds management and administration, sophisticated portfolio construction and stock selection, and strategic asset allocation. He also provides comprehensive stockbroking and advice services, implements robust risk mitigation strategies and management, and integrates environmental, social, and governance (ESG) factors into investment decisions.

Peter's extensive experience allows him to provide insightful and resilient investment guidance across diverse market conditions, ensuring clients feel confident in their long-term financial direction.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research