ORD MINNETT

Phillip Lucas

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

- Master of Applied Finance, Macquarie University
- Graduate Diploma of Financial Planning, Kaplan Professional

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Superannuation
- Margin Lending
- Securities & Managed Investments

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Life risk insurance
- Superannuation & SMSF

Background

Phillip is a Senior Private Wealth Adviser with over 14 years of experience in the financial services industry, including over a decade dedicated to advising clients at Ord Minnett. He provides strategic and high-touch investment advice tailored to the unique needs of high net worth and ultra-high net worth individuals, families, self-managed super funds (SMSFs), and charitable foundations.

Phillip delivers high-quality and strategic investment advice across a comprehensive range of asset classes, encompassing Australian and international equities, fixed interest instruments, derivatives, and sophisticated cash management solutions. He also possesses specialist skills in portfolio construction and strategic asset allocation, complemented by deep expertise in navigating the complexities of superannuation, comprehensive retirement planning, and effective risk minimisation strategies. Phillip's profound understanding of financial markets is further enhanced by a strong and consistent track record in both building and diligently preserving wealth for his clients through the implementation of carefully tailored investment strategies.

A key focus within Phillip's practice involves the intricate management of intergenerational wealth transfer, where he collaborates closely with solicitors, accountants, and charitable foundations to ensure beneficiaries are well-supported through often sensitive and significant transitions.

Financial Planning	Investment Advice & Strategy	Portfolio Construction & Management
Portfolio Reporting & Administration	Superannuation & SMSF	Stockbroking
Retirement Planning	Philanthropic Giving	Investment & Market Research