

ORD MINNETT

Rob Gertsakis

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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D: 02 8216 6518
E: rgertsakis@ords.com.au

Ord Minnett
Grosvenor Place
Level 18, 225 George Street
Sydney NSW 2000
ords.com.au

Connect with me on [LinkedIn](#)

Qualifications

- Bachelor of Commerce (Liberal Studies), The University of Sydney
- Diploma of Financial Planning, Kaplan Professional

Certifications

- Registered Tax (Financial) Adviser, Tax Practitioners Board

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Life risk insurance
- Redundancy & early retirement
- Retirement planning
- Superannuation & SMSF

Background

Rob utilises his strong background in economics and investment management to deliver comprehensive financial advice.

His core focus lies in strategic asset allocation and robust wealth protection through effective investment structuring and diligent portfolio management. Rob has accumulated 12 years of experience within the wealth management industry, encompassing a variety of advice-focused roles, with the last 11 years spent at Ord Minnett. This extensive and varied experience enables him to offer full-service investment management and financial planning solutions, including expert guidance on superannuation and insurance.

Rob combines his distinct financial planning knowledge with his investment management acumen to provide holistic advice tailored to each client's unique needs and objectives. His investment philosophy centres on protecting capital through dynamic asset allocation and generating strong returns by identifying and investing in targeted investment themes.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research