

ORD MINNETT

Sam Wales

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

- Bachelor of Arts & Commerce (Finance & Political Science), Australian National University

Certifications

- Accredited Derivatives Adviser, Level 1 & 2

Areas of Advice

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

Background

Sam brings over nine years of experience in the financial services industry, underpinned by a strong foundation developed during his time at Colonial First State. There, he provided general financial advice to retail clients, building essential skills that have supported his continued professional growth.

At Ord Minnett, Sam specialises in strategic asset allocation and active portfolio management, with a keen eye for identifying and capitalising on growth and yield opportunities within the dynamic market landscape. His core focus centres on ASX-listed securities, where he develops and implements a diverse range of investment strategies that are meticulously tailored to align with the specific objectives and individual risk tolerance of each client he advises.

Recognising the importance of comprehensive financial planning, Sam also provides sophisticated risk-management and income-generating strategies through the strategic application of derivatives, ensuring a well-rounded approach to wealth management.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research