Sasha Balding

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 Financial Planning, University of Technology Sydney (Winner of 2023 Dean's Merit Award)
- Bachelor of Business, University of Technology Sydney

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

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

Background

Extensive Market Experience

With over 20 years of experience in financial markets across institutional equities and wealth management, Sasha brings deep expertise and insight to her role as a Private Wealth Adviser. Her ability to distil complex financial concepts and deliver clear, actionable advice makes her a trusted partner to a diverse client base, including young professionals, retirees, foundations, family offices, and ultra-high net worth individuals.

Client-Centred Approach

Sasha begins every relationship by taking the time to understand each client's unique financial circumstances, aspirations, and long-term objectives. From there, she designs bespoke financial strategies to guide clients along the most optimal path toward achieving their goals.

Strategic Wealth Management

Sasha loves solving problems! She crafts solutions that grow and protect wealth. Her portfolio construction is grounded in delivering strong financial performance, in consideration of each client's risk tolerance and incorporating relevant thematics and aligned with their values

Empowering Financial Confidence

Sasha sees her role not just as an adviser, but as a long-term investment partner. She equips her clients with the knowledge and tools to make informed decisions, ensuring they feel in control of their financial journey. Whether the goal is building wealth, preserving it, or navigating complex transitions, Sasha is dedicated to helping her clients achieve clarity and confidence in their financial future.

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