

ORD MINNETT

Sean Allitt

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

- Graduate Diploma of Financial Planning
- Bachelor of Commerce (Economics & Finance)

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

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

Background

With over 15 years of experience in private wealth management, Sean specialises in delivering comprehensive financial advice to high net worth individuals, families, and business owners. Holding advanced qualifications in economics, finance, risk, and financial planning, he combines deep technical knowledge with a practical, client-first approach to wealth creation and preservation.

Sean's expertise spans strategic financial planning, superannuation and retirement strategies, portfolio administration, tax-efficient investment structures, and estate planning. He also possesses strong capabilities in corporate finance, capital markets, and fixed income, including access to wholesale bonds, term deposits, and initial public offering (IPO) opportunities.

Whether advising on philanthropic giving or navigating complex intergenerational wealth transfers, Sean's focus is always on providing tailored, forward-thinking solutions that align with each client's unique goals, values, and long-term vision.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research