

ORD MINNETT

Stephanie Johansen

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

- Diploma of Financial Markets, FINSIA

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Redundancy / early retirement
- Superannuation & SMSF

Background

Stephanie is a Private Wealth Adviser based in Sydney, serving a diverse range of clients across Australia and internationally.

With over 20 years of comprehensive experience in the share market, Stephanie's career spans roles in back office operations, research, trading, and management, providing her with a unique and valuable understanding of all facets of the broking industry. Stephanie specialises in tailoring individual portfolios to meet the specific needs of each client, utilising a broad range of products including Australian and international shares, exchange traded funds (ETFs), options trading, margin lending, and term deposits, with funds under management exceeding \$650 million.

Stephanie's unwavering client-first focus has fostered long-term relationships, with many families entrusting their financial wellbeing to Stephanie across four generations. She also dedicates her expertise to managing portfolios for a select group of large charities, aiming to benefit the wider community. She is also a member of the Stockbrokers and Investment Advisers Association (SIAA).



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research