ORD MINNETT

Vera Lin

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.

Vera Lin

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Qualifications

- Diploma of Financial Planning, Kaplan Professional
- Bachelor of Commerce (Finance), UNSW

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

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

Background

As a qualified Financial Planner and Private Wealth Adviser with over 17 years of combined experience in the financial services industry, Vera provides strategic solutions to a diverse range of clients, including individuals, corporate entities, small and medium enterprises (SMEs), family trusts, self-managed super funds (SMSFs), testamentary trusts, and sophisticated & professional investors.

Her overarching aim is to empower them to achieve their financial and lifestyle goals through expert advice in wealth accumulation, superannuation (including SMSF), and comprehensive retirement planning. Vera works closely with her clients through major life events, tailoring both a financial plan and a suitable investment portfolio to reflect their evolving objectives over time. This includes navigating significant transitions such as buying or selling property, provisioning for children's expenses (e.g. private school fees, or assistance with property purchases), planning for retirement, downsizing, managing separations and blended families, succession planning, aged care advice, and the distribution of inheritance and deceased estates.

Clients benefit from Vera's deep expertise in investment structuring and the implementation of tax-effective strategies, alongside comprehensive financial planning and life insurance advice. Her approach also encompasses meticulous portfolio construction and asset allocation management, with proficiency across a wide array of investment options, including direct equities, hybrids, bonds, derivatives, exchange traded funds (ETFs), listed Investment companies (LICs), listed investment trusts (LITs), managed funds, private credit, private equity, and alternatives.

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