

ORD MINNETT

William Quach

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

- Master of Applied Finance, Kaplan Professional
- Bachelor of Business (Finance & Management), University of Technology Sydney

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Superannuation
- Margin Lending

Areas of Advice

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

Background

William brings more than 20 years of experience in the financial industry, specialising in investment advice and portfolio management.

He has a proven track record of assisting clients with their investment portfolios, self-managed super funds (SMSFs), family trusts, and corporate entities. William manages a significant portfolio of funds under advice, reflecting the trust clients place in his expertise. He leverages his extensive experience to provide tailored investment and superannuation advice, aiming to help clients achieve strong returns.

William excels in financial planning and structuring, ensuring client portfolios are optimised for both growth and stability. Through his strategic guidance, he assists clients in reaching their investment goals and securing their financial futures.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research