ORD MINNETT

Edward Watson

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, UNSW
- Bachelor of Business, University of Technology Sydney

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

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

Background

Edward has worked in the financial services industry since 2017, initially gaining experience at Macquarie Bank before commencing his career as a Financial Adviser in December 2018, first at Koda Capital, and later joining Ord Minnett in 2020.

As a trusted Private Wealth Adviser, Edward is dedicated to helping individuals, families, and businesses effectively manage and protect their wealth. He recognises the unique requirements of each client and excels at finding the optimal balance between achieving strong investment outcomes and aligning with their specific risk tolerance and lifestyle objectives.

Edward adopts a holistic approach to wealth management, providing his clients with strategic advice encompassing retirement and succession planning, in addition to expert investment advice and ongoing portfolio management. His commitment is to provide tailored strategies that empower clients to achieve their long-term financial aspirations with confidence.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research