ORD MINNETT

Alison Perrott

Senior Investment 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

- Bachelor of Business (Finance & Economics), University of Technology Sydney
- Diploma of Financial Planning, Deakin University

Certifications

- Governing for Nonprofit Excellence, Social Enterprise Harvard Business School
- Company Directors Course (Role of the Chair), Graduate of the Australian Institute of Company Directors (GAICD)
- Certified Financial Planner (CFP), Financial Planning Association of Australia
- Master Stockbroker, Stockbrokers & Investment Advisers Association (MSIAA)
- Responsible Executive (RE), ASX/ACH, ASX

Advice Categories

- For-purpose specialist
- Asset allocation
- Investment management
- Investment strategies & policy
- Environmental, Social & Governance (ESG)
- Risk profiling

Background

Alison is a Senior Fixed Income Specialist and a highly qualified Asset Consultant and Portfolio Adviser who joined Ord Minnett in 2007. Prior to Ord Minnett, Alison was a founding Director of Grange Securities Limited, a specialist fixed interest advisory firm, where she led the business development strategy and asset allocation. With over 30 years of experience in financial markets, Alison has also held senior positions at Westpac and Fay, Richwhite Merchant Bank.

Alison has advised and managed client portfolios across a wide range of investment products, including short-term cash, bank bills, bonds, floating rate notes, hybrid securities, structured products, equities, and derivatives, either directly held and via managed funds, domestically and internationally. Socially Responsible Investing (SRI) is one of her specialties.

She has dedicated over 30 years to the “for-purpose” sector, providing treasury management, asset allocation, and investment advice (including ESG overlays) to not-for-profit and aged care sectors, as well as religious organisations. Alison regularly formulates and presents recommendations to Boards and Trustees, covering annual investment strategy reviews, performance benchmarking, client communication, and reporting requirements.

In addition, Alison consults to a variety of “for-profit” organisations, including superannuation funds, health insurers, family trusts, and companies. In each case, she undertakes individual risk/return and asset/liability modelling to tailor investment strategies and portfolio management in line with each client’s unique requirements, risk profile, goals, and ESG considerations.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research