

**ORD MINNETT**

**Craig Ellis**

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.



# Craig Ellis

Senior Private Wealth Adviser

M: 0404 086 346  
D: 08 6179 6412  
E: [cellis@ords.com.au](mailto:cellis@ords.com.au)

Connect with me on [LinkedIn](#)

Ord Minnett  
Level 27  
108 St Georges Terrace  
Perth WA 6000  
[ords.com.au](http://ords.com.au)

## Certifications

- Margin Lending
- Superannuation
- Managed Investments

## Areas of Advice

- Asset allocation
- Investment strategies

## Background

Craig is a Senior Private Wealth Adviser who joined Ord Minnett more than five years ago to set up Ord Minnett's Perth office. With more than three decades in the finance industry, having worked at leading Australian and global wealth management firms, Craig has substantial investment experience across equities (domestic and international), fixed interest, futures and foreign exchange (FX).

He provides tailored advice to his clients through numerous business and market cycles and is an advocate for the importance of a disciplined approach to risk management through the implementation of strategic asset allocation and diversification across asset classes.

Craig has a deep practical experience of most investment asset classes having worked in both institutional and retail equities, financial futures, fixed interest markets and FX over his career. He partners with a team of experts to provide detailed strategic advice on a range of areas including investment strategies, investment policy statements and family charters.

Craig advises high net worth families, not-for-profits, school foundations and investment intermediaries on capital preservation and long-term wealth management across generations.

Craig is a family man who supports various community organisations and causes, including Multiple Sclerosis WA and The Smith Family, while staying physically active through his involvement as a player and sponsor of Cottesloe Tennis Club.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research