ORD MINNETT

Charles Mackinnon

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.

Charles Mackinnon

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Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional

Certifications

- Company Directors Course, Graduate of the Australian Institute of Company Directors (GAICD)
- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending
- Superannuation

Authorisations

- Singapore Institute of Banking and Finance Trading Representative
- SFA Futures and Options Representative
- FA Securities Representative

Areas of Advice

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

Background

Charlie provides financial and investment advice to a diverse range of clients including families, professionals, farmers, retirees, and not-for-profits.

Caring deeply about his clients' financial well-being, Charlie builds strong, long-term relationships with his clients. When a client comes on board with Charlie, he takes the time to get to know them and understand their financial situation, aspirations and values. His financial advice is clear and personalised so his clients understand and can feel confident in their investment choices.

Charlie brings experience in financial markets in Australia and overseas in both institutional equities and wealth management. This experience allows him to identify opportunities and to guide clients through the complexities of financial markets.

His love of solving problems combined with his background in trading and business management helps him provide clients with strategies that grow and protect their wealth for the current generation as well as those that follow.

Charlie has more than 20 years of experience in financial markets. Most recently, 17 years as a financial adviser in Australia at Ord Minnett and E. L. & C. Baillieu. Prior to this, he spent three years as an institutional sales-trader at UBS in Asia ex-Japan where he worked and lived in Hong Kong, Mumbai & Singapore.

Charlie also brings 5 years' experience managing a family business, where he was an active trader in livestock and in soft commodities.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research