ORD MINNETT

Courtney Biggs

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.

Courtney Biggs

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Qualifications

- Bachelor of Applied Finance, University of South Australia
- Advanced Diploma of Financial Services (Financial Planning), Kaplan Professional

Certifications

- Company Directors Course, Graduate of the Australian Institute of Company Directors (GAICD)
- Certified Practising Accountant, CPA Australia

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Courtney is a Private Wealth Adviser based in Mildura, who not only has local clients but also spans the vast agricultural surrounds.

Attracted to the industry to grow wealth, and backed by 20 years of experience, Courtney helps clients manage transitionary events, such as farm/business succession and planning for retirement, as well as liquidity events, such as selling an asset or receiving an inheritance.

Courtney's clients are high net worth individuals, farmers and business owners with whom she enjoys a long standing and trusted relationship.

Courtney's main areas of expertise are retirement planning, superannuation and managing wealth transition.

As a standard process, Courtney will work with clients to refine what's most important to them, before engaging with the accountant and setting an appropriate investment structure and strategy to successfully move forward with.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research