

**ORD MINNETT**

# Nicholas Paunovic

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.



# Nicholas Paunovic

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## Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Bachelor of Finance (Business Finance), University of Newcastle

## Certifications

- Accredited Derivatives Adviser Level 1 & 2

## Areas of Advice

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

## Background

Nicholas first became interested in the share market as a teenager, building a portfolio on the guidance from his mother when he turned 18.

Pursing his interest in finance, he moved to Newcastle to study a Bachelor of Finance and has been a Novocastrian ever since.

Nicholas has worked in the industry since 2006 and has been advising clients at Ord Minnett since 2008. He is part of a successful advisory team alongside fellow Senior Private Wealth Adviser Lara Kable, specialising in portfolio construction, investment implementation, and day-to-day portfolio management.

Nicholas prefers direct investing whenever possible, focusing on listed Australian and international shares, exchange traded funds (ETFs), hybrids, wholesale bonds, and term deposits. With this direct approach, Nicholas believes he can achieve a better risk-reward trade-off for his clients.

His clients include high net worth individuals, family groups, not-for-profits, associations, and superannuation portfolios.

Nicholas is a family orientated person who enjoys the outdoors, particularly surfing, fishing, camping and mountain bike riding.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research