

ORD MINNETT

Alison Kolb

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.



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Qualifications

- Diploma of Financial Planning, Kaplan Professional
- Professional Diploma in Stockbroking, Stockbrokers Association of Australia
- Bachelor of Commerce, Griffith University

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending

Areas of Advice

- Asset Allocation
- Financial Advice
- Life risk insurance
- Retirement planning
- Superannuation & SMSF

Background

Alison joined Ord Minnett in 2014, bringing over a decade of experience in private wealth management, gained from her time at prestigious firms such as Morgan Stanley Private Wealth, Macquarie Bank, and Keystone Private Family Office.

Alison's client-focused approach to financial solutions has been shaped by her diverse experiences in high net worth wealth management. Before her finance career, Alison was an elite rower, representing Australia internationally, a background that instilled in her values of compassion, competitiveness, and teamwork. These values are evident in her professional life, where she works diligently to foster long-term success for her clients.

Alison's areas of expertise allow her to provide comprehensive wealth management, specialist guidance on superannuation and self-managed super funds (SMSFs), tailored investment services, and personalised investment advice and portfolio construction for her clients.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research