

ORD MINNETT

Anne Williamson

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

- Advanced Diploma of Financial Planning, Kaplan Professional
- Bachelor of Commerce, The University of Queensland
- Bachelor of Economics, The University of Queensland

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

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

Background

With more than 35 years of experience in the financial markets, Anne has developed deep expertise in evaluating a wide range of investment products, from traditional financial instruments like bonds and currencies to more complex assets such as grain, power and gas.

For the past 18 years, she has been a key member of the esteemed Ord Minnett team, helping clients navigate the complexities of investment markets. Anne takes a tailored approach to portfolio management, ensuring investments align with each client's financial goals and risk tolerance. Known for her honest, straightforward communication, Anne builds long-term relationships based on trust and loyalty.

Her commitment to client success goes beyond wealth accumulation, focusing on creating opportunities that provide financial freedom and peace of mind.

Anne's comprehensive services and unwavering commitment to her clients make her a trusted partner in advice and financial planning. Her ability to break down complex concepts, provide personalised advice, and support clients through every stage of their financial journey sets her apart as a leader in the field.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research