

ORD MINNETT

Brec Fenton

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

- Graduate Diploma of Applied Finance and Investment, Securities Institute of Australia
- Bachelor of Business, Queensland University of Technology

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies

Background

Brec brings more than 20 years of dedicated experience in investment management to his role with Ord Minnett. He focuses his expertise on developing and meticulously executing tailored investment strategies that are directly aligned with his clients' specific financial goals and individual stages of life.

Brec places significant emphasis on nurturing strong client relationships, providing highly personalised advice and delivering regular, comprehensive performance updates. This ensures that clients remain well-informed and actively engaged with the management of their investment portfolios. With a strong analytical foundation, Brec effectively utilises in-depth market research and strategic asset allocation principles to drive well-informed investment decisions.

His excellent communication skills are invaluable in clearly explaining complex financial concepts, empowering clients to feel confident and knowledgeable when making crucial investment choices within the realm of investment services.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research