David Lane

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

- Master of Applied Finance
- Graduate Diploma of Financial Planning
- Graduate Diploma of Applied Finance and Investment
- Bachelor of Business, (Accounting)

Certifications

- Certified Practising Accountant, CPA Australia
- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

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

Background

Drawing on over three decades of deep experience within financial markets, David provides clients with comprehensive and holistic advice encompassing strategic asset allocation, meticulous portfolio construction, and bespoke investment recommendations tailored to their individual needs.

He has established a strong and proven track record of successfully navigating periods of market volatility, ensuring long-term financial success for a diverse clientele, including private investors, families, superannuation funds, business owners, not-for-profits, corporations, and institutions. David adopts a sensible and patient long-term investment philosophy, carefully tailored to align with each client's unique financial goals and aspirations. A respected and trusted voice within the financial industry, his expert insights are frequently sought by prominent media outlets, with regular contributions to Ausbiz and Sky Business, and features in leading news publications and podcasts.

David's expertise extends to the tailored management of Managed Discretionary Accounts (MDAs), comprehensive wealth management strategies, and insightful guidance on superannuation and self-managed super funds (SMSFs). His standing in the industry is further underscored by his ranking in Barron's Australian Top 100 Financial Advisers in both 2020 and 2021, and his experience as a seasoned speaker at numerous investment conferences. David is also a Fellow of the Financial Services Institute of Australasia (FINSIA) and is a member of the Australian Institute of Company Directors (AICD).

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research