

**ORD MINNETT**

**Adam Spicer**

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.



# Adam Spicer

Private Wealth Adviser

M: 0402 137 497  
D: 03 9602 9288  
T: 03 9608 4111  
E: [aspicer@ords.com.au](mailto:aspicer@ords.com.au)

Ord Minnett  
Level 22  
35 Collins Street  
Melbourne VIC 3000  
[ords.com.au](http://ords.com.au)

Connect with me on [LinkedIn](#)

## Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Bachelor of Business (Accounting), Monash University
- Bachelor of Business (Banking & Finance), Monash University

## Certifications

- Margin Lending
- Accredited Derivatives Adviser Level 1

## Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Superannuation & SMSF

## Background

With more than 25 years of experience in financial markets, Adam's passion for investing began in his youth. His professional journey includes roles at esteemed organisations such as ANZ, Morgan Stanley, and Lincoln Indicators, an equities research house and fund manager.

Adam's academic credentials include a double degree from Monash University, encompassing a Bachelor of Business (Accounting) and a Bachelor of Business (Banking & Finance), alongside a Graduate Diploma of Financial Services (Financial Planning) from Kaplan Professional.

Specialising in direct investment and strategic asset allocation, Adam caters to a select client base of high net worth individuals, trusts, family offices, and superannuation funds. He emphasises the precise alignment of investment recommendations with client objectives, implementing ongoing portfolio reviews and strategic adjustments to adapt to evolving client needs.



Financial Planning



Portfolio Reporting & Administration



Retirement Planning



Investment Advice & Strategy



Superannuation & SMSF



Philanthropic Giving



Portfolio Construction & Management



Stockbroking



Investment & Market Research