ORD MINNETT

Andrew Epplett

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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M: 0432 835 822
D: 03 9608 4101
E: aepplett@ords.com.au

Connect with me on LinkedIn

Ord Minnett
Level 22
35 Collins Street
Melbourne VIC 3000
ords.com.au

Qualifications

- Bachelor of Commerce (Accountancy & Finance), University of Wollongong

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

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

Background

Andrew began his career in finance in 2001 and has since accumulated over 20 years of experience working with several large Australian financial institutions. Specialising in advising high net worth individuals and their families, Andrew is dedicated to understanding his clients' motivations and helping them make informed financial decisions that will benefit future generations. His approach provides clients with the guidance and peace of mind they need to live the life they desire, secure in the knowledge that their wealth is well-managed.

Andrew's areas of expertise include wealth management, financial planning, risk management, and client relationship management. His ability to build strong, lasting relationships, combined with his deep understanding of financial markets and investment strategies has allowed him to create comprehensive and tailored financial strategies for his clients.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research