

ORD MINNETT

Bryce Appleton

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

- Diploma Financial Planning, Deakin University
- Bachelor of Business (Accounting), Monash University

Certifications

- Certified Financial Planner (CFP), Financial Planning Association of Australia
- Accredited Derivatives Adviser Level 1

Areas of Advice

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

Background

Bryce specialises in crafting and implementing comprehensive wealth management strategies for individual clients and self-managed super funds (SMSFs). He is able to advise on investment strategies, Australian investment markets, SMSFs and the implementation of financial plans.

With more than 22 years of advisory experience at Ord Minnett, Bryce brings a wealth of knowledge gained from his tenure. Prior to joining Ord Minnett, he held positions with a large global investment bank and a top four accounting firm, providing him with a diverse and robust understanding of the financial landscape. Bryce draws upon his extensive experience to offer a specific and tailored service, understanding that each client has unique investment goals and requirements.

He is committed to providing personalised guidance and building long-term relationships based on trust and a deep understanding of his clients' financial aspirations.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research