

ORD MINNETT

Callan Trew

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: 0448 530 366
D: 03 9608 4122
E: ctrew@ords.com.au

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

Connect with me on [LinkedIn](#)

Qualifications

- Bachelor of Management (Finance & Financial Planning), Deakin University

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Margin lending

Background

Callan joined Ord Minnett in 2011 from a leading private wealth firm, bringing a strong focus on multi-asset class portfolio construction tailored to each client's unique needs.

His expertise spans Australian and international equities, fixed interest, bonds, options, and warrants, with a keen focus on strategic asset allocation and investment strategy. Callan specialises in identifying global investment opportunities with significant potential for long-term compounding growth and provides solutions to enhance income.

Callan's comprehensive approach ensures that clients' portfolios are optimally structured for both growth and income, with a particular emphasis on superannuation and achieving optimal financial results.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research