

ORD MINNETT

Charlie Heerey

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

- Graduate Diploma of Applied Finance & Investment, Kaplan Professional
- Graduate Diploma in Philanthropy & Nonprofit Studies, Queensland University of Technology
- Bachelor of Economics (Honours), Monash University

Areas of Advice

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

Background

Charlie has more than 25 years of experience in financial markets, helping high net worth private clients and not-for-profit organisations manage their investment portfolios.

He joined in 2014 as a Financial Adviser, having previously worked at Phillip Capital, Bell Potter, and JBWere. Before transitioning to financial advising, Charlie worked in corporate and business banking at Westpac. He provides tailored financial advice across asset allocation, Australian equities, international equities, fixed interest, and derivative strategies.

Charlie is a strong advocate for the not-for-profit sector, managing several charity and NFP investment mandates. Charlie led the creation of the Baillieu Charities Fund in 2019, which supports early-stage charities that resonate with staff passions, and played a key role in expanding it into the Ord Minnett Charities Fund.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research