ORD MINNETT

# Christopher Nicholas

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

- Bachelor of Business (Accounting)

## Certifications

- Certified Practicing Accountant
- Accredited Derivatives Adviser Level 1

## Areas of Advice

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

## Background

Chris has been a valued member of Ord Minnett since 1998. Highly qualified to advise on the complexities of superannuation and taxation, Chris also holds the accreditation of a Level 1 Options Adviser.

Before joining Ord Minnett, Chris gained valuable experience at a chartered accounting firm, providing insights into financial structures and compliance. He also served as an Investment Adviser for over 100 self-managed super funds (SMSFs) at Trust Company of Australia, developing a deep understanding of individual investment needs.

Chris is known for his partnership-based approach, seamlessly blending his extensive industry experience with practical skills to deliver relevant, innovative, and professional advice, comprehensive support, and exceptional service to his clients.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research