

**ORD MINNETT**

# Dale Weeks

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.



# Dale Weeks

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## Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional

## Certifications

- Margin Lending
- Accredited Derivatives Adviser Level 1

## Areas of Advice

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

## Background

Dale has 20 years of financial services experience, and became a Private Wealth Adviser in 2018, specialising in strategic investment guidance for high net worth clients. Her career began in 2005 at Tolhurst Ltd, followed by Bell Potter in 2009, where she established a robust foundation in financial markets. In 2012, Dale transitioned to UBS Wealth Management, focusing on holistic wealth strategies.

In 2015, she assumed a direct advisory role at Ord Minnett, leveraging her extensive market acumen and client-focused methodology. Collaborating with her business partner, accountants, and financial planners, Dale delivers tailored investment solutions, ensuring comprehensive wealth management. She empowers clients to navigate intricate investment decisions with clarity and assurance.

Dale's expertise extends to self-managed super funds (SMSFs), sophisticated investors, and charitable organisations, ensuring strategic asset allocation and long-term financial success. Cultivating strong relationships with professionals, Dale offers a holistic approach to investing, providing sophisticated, goal-oriented financial counsel. She specialises in crafting personalised investment strategies that align with clients' financial goals, leveraging her deep market knowledge to build diversified portfolios.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research