

ORD MINNETT

Daniel Cimoli

Senior Investment 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 Commerce (Economics & Finance) (Honours), Deakin University
- Graduate Diploma of Applied Finance and Investments, Securities Institute of Australia

Areas of Advice

- Asset allocation
- Investment strategies
- International portfolios
- Trading services

Background

Daniel brings more than 25 years of experience in financial services. As a Senior Investment Adviser, he has worked at State Street in London and Lonsec Stockbroking before joining Ord Minnett.

Since joining Ord Minnett more than 10 years ago, Daniel has cultivated strong relationships with numerous intermediaries in the financial planning sector, delivering both investment advice and trading services. His practical experience within a financial planning firm has given him a deep understanding of self-managed super funds (SMSFs). Daniel specialises in crafting and managing international portfolios, and his broad expertise encompasses a wide range of trading services.

He is committed to providing clear and effective investment strategies, tailored to meet the unique needs of his clients.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research