

**ORD MINNETT**

**Daniel Swallow**

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.



# Daniel Swallow

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## Qualifications

- Master of Applied Finance, Macquarie University
- Bachelor of Commerce, The University of Melbourne

## Certifications

- Certificate in ESG Investing, CFA Institute
- Margin Lending

## Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

## Background

Daniel is a highly experienced Senior Private Wealth Adviser with more than 15 years of expertise in the financial industry, including nine as an Adviser. He provides trusted investment advice to some of Australia's most successful business people and families at CBA Private, ANZ Private, and most recently, Perpetual Private.

Daniel takes a thorough and methodical approach to investment management, understanding that each client has unique goals. He expertly combines his deep understanding of client needs with an endowment-style investment strategy, incorporating both traditional and alternative asset classes like private equity, private debt, and global infrastructure to create a bespoke diversified multi-asset portfolio tailored to their needs.

His focus on protecting and growing wealth across multiple generations ensures long-term financial security and prosperity for his clients.

Daniel is a trusted adviser who leverages his extensive knowledge and experience to help clients adopt effective strategies for protecting and growing their capital. He values education, guiding clients with clarity and simplifying complex concepts to build their confidence and focus on financial goals.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research